

# Financial Planning I (2025)

Understand the basics of finance. 1.00

- 1 Utilize time management skills to determine best options/outcomes. 1.01
- 2 Describe the need for financial information. 1.02
- 3 Explain the role of finance in business. 1.03
- 4 Describe the role of financial institutions. 1.04
- 5 Discuss employment opportunities in the finance industry (accounting). 1.05

Understand the basics of investing. 2.00

- 1 Explain types of financial markets (e.g., money market, capital market, insurance market, commodities markets, etc.). 2.01
- 2 Describe types of financial-services providers. 2.02
- 3 Describe types of retail/business banking products and services. 2.03
- 4 Explain types of investments. 2.04
- 5 Discuss employment opportunities in the finance industry. 2.05

Understand financial analysis. 3.00

- 1 Utilize sources of securities information to make informed financial decisions. 3.01
- 2 Acquire fundamental knowledge of investment analysis and selection to make prudent investment decisions. 3.02
- 3 Select investments to generate revenue for clients. 3.03
- 4 Acquire knowledge of securities products and benefits to support workplace activities. 3.04
- 5 Discuss employment opportunities in the finance industry (investment/securities). 3.05

Understand law and security measures in business. 4.00

- 1 Determine the relationship between government and business. 4.01
- 2 Discuss legal considerations in the finance industry. 4.02
- 3 Explain routine security precautions. 4.03

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**4 Follow established security procedures/policies.** 4.04

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**5 Explain information privacy, data security, and confidentiality considerations in business.** 4.05

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**6 Discuss employment opportunities in the finance industry (corporate finance).** 4.06

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**Understand the impact of the economy on financial decisions.** 5.00

**1 Understand economic indicators to recognize economic trends and conditions.** 5.01

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**2 Understand financial markets to recognize their importance in business.** 5.02

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**3 Determine global trade's impact on business decision-making to acquire insight into the global forces affecting business.** 5.03

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**4 Explain causes of stock price fluctuations.** 5.04

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**5 Discuss employment opportunities in the finance industry.** 5.05

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