

Finance Cluster



Business & Personal Finance Syllabus

Course Title: Business & Personal Finance

Course Number: 8118

Pre-requisites: Fundamentals of Technology or Business and Computer Technology

Career Pathway/Major: Business Financial Management/Financial Assistant

Instructor: Nicole Mayhew
nmayhew@goodwell.k12.ok.us

Locations: Goodwell Public Schools

Length: 1 Carnegie Unit
175 forty-five (45) minute class periods per school year

Possible Career Outcome: Financial & Investment Advisor, Financial Assistant, Financial Customer Service, Bill and Account Collector, Bank Teller, Customer Service Representative

Course Description: This course will provide students with the skills to manage personal finances, identify the characteristics of effective business financial goals, and examine the organization and activities of commercial banks and other financial institutions. Students will examine case studies and complete teamwork projects which require critical thinking for the financial aspect of business in banks, other financial institutions, business insurance, and the operations of technology and financial management in the global setting. The knowledge and skills outlined in Business and Personal Finance may be taught in conjunction with the standards set forth in the Passport to Financial Literacy Act of 2007 (70 O.S. 11--103.6h). However, Personal Finance is the course specifically designed to meet this requirement.

Learning Competencies

Personal Finance	
Competencies include: Analyzing pay benefits, work arrangements and organizations, preparing and filing tax returns, preparing a budget, studying legal documents and personal filing systems, banking services and other services for financial security, credit management, risk management and consumer rights and responsibilities.	
Pay, Benefits, Working Conditions	Investments

Federal Income Tax	Retirement and Estate Planning
Budgeting	Credit Management
Legal Contracts	Resource Management
Checking Accounts	Risk Management
Savings	Consumer Rights and Responsibilities
Business Finance	
Competencies for this portion of the course will engage students in examining the financial aspect of business for financial management and analyze financial records for business activities. Banks and other financial institutions, business insurance, and technology in the global setting will be topics for case studies and teamwork projects involving critical thinking. Sample skill sets include:	
Financial Management Planning	Financial Budgeting
Financial Records	Business Expansion Strategies
Debt and Equity Financing	Banks and Other Financial Institutions
Customer Credit	Business Insurance
International Business	Technology Use in Business Finance

Instruction:

95-class periods theory/80class periods lab

Methods of Instruction include: lectures, class discussions, hands-on training, demonstrations, projects, and performance evaluation.

Required Brainbench Certifications:

- Consumer Finance
- Investment Concepts

Recommended Additional Competency Testing:

- Accounts Payable Fundamentals
- Accounts Receivable/Billing Fundamentals
- Bookkeeping Fundamentals
- Payroll Fundamentals

Recognized Primary Course Textbooks and Instructional Resources:

Available at <http://www.cengage.com>

- Managing Your Personal Finances, 6th Edition.
- Business Finance.
- On Your Own, A Personal Budgeting, Simulation.
- Family Financial Management, 8th Edition.
- Center for Financial Training, Banking Systems.
- National Association of Investors Corporation. Investing In Your Future 2E.

- Fundamentals of Insurance
- Financial Math Review
- International Business, 3E

Available at <https://www.mheonline.com>

-Business and Personal Finance.

-Entrepreneurship and Small Business Management

Available at <http://www.okcimc.com/new/index.htm>

-Life Skills: Financial Literacy Skills CIMC. BS1004, 2009.

Available: <http://www.1stfinancialtraining.com/>

-Credit: It's in Your Control. 1st Financial Training Services.

Available at <http://www.smgww.org/>

-SMG, The Stock Market Game