# Finance: Business Financial Management: Finance

**Career Pathway Plan of Study for ▶ Learners ▶ Parents ▶ Counselors ▶ Teachers/Faculty**

This Career Pathway Plan of Study (based on the Financial and Investment Planning Pathway of the Finance Career Cluster) can serve as a guide, along with other career planning materials, as learners continue on a career path. Courses listed within this plan are only recommended coursework and should be individualized to meet each learner’s educational and career goals. *This Plan of Study, used for learners at an educational institution, should be customized with course titles and appropriate high school graduation requirements as well as college entrance requirements.*

### EDUCATION LEVELS

<table>
<thead>
<tr>
<th>GRADE</th>
<th>English/Language Arts</th>
<th>Math</th>
<th>Science</th>
<th>Social Studies/Sciences</th>
<th>Other Required Courses Other Electives Recommended Electives</th>
<th>Learner Activities</th>
<th>‘Career and Technical Courses and/or Degree Major Courses for Investment Planning Pathway: Finance</th>
<th>SAMPLE Occupations Relating to This Pathway</th>
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<tbody>
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<td>9</td>
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<td>Accountant, Brokerage Clerk, Commodities Representative, Development Officer, Financial Analyst, Financial Planner, Foundation Manager, Fund Manager, Fund Raiser, Investment Advisor, Mutual Fund Manager, Non-Profit Manager, Personal Financial Advisor, Planned Giving Director, Sales Agent, Securities Representative, Tax Preparer</td>
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- Interest Inventory Administered and Plan of Study Initiated for all Learners
- Courses with advanced standing and/or transcripted credit are indicated in RED.

### SAMPLE Occupations Relating to This Pathway

- Accountant
- Brokerage Clerk
- Commodities Representative
- Development Officer
- Financial Analyst
- Financial Planner
- Foundation Manager
- Fund Manager
- Fund Raiser
- Investment Advisor
- Mutual Fund Manager
- Non-Profit Manager
- Personal Financial Advisor
- Planned Giving Director
- Sales Agent
- Securities Representative
- Tax Preparer

### Articulation/Dual Credit

Articulation/Dual Credit Transcribed-Postsecondary courses may be taken/moved to the secondary level for articulation/dual credit purposes.

### WITC FINANCE

<table>
<thead>
<tr>
<th>Year</th>
<th>Written Communication; Speech</th>
<th>Math with Business Applications</th>
<th>Economics</th>
<th>MS Word A; MS Excel; Keyboarding</th>
<th>Financial Accounting 1; Financial Accounting 2; Principles of Finance; Personal Finance; Team Building and Problem Solving</th>
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<tr>
<td>13</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Money and Banking; Investments; Principles of Insurance; Marketing Principles; Professional Profile; Business Law; Supervision</td>
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<td>14</td>
<td>Technical Reporting</td>
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<td>Introduction to Sociology; Introduction to Psychology</td>
<td>MS Access A; MS PowerPoint; Job Quest</td>
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### Advanced Standing Option

WITC has articulation agreements with the following institutions for students who graduate from WITC with an Associate Degree in Finance. Students should check with the institution they wish to transfer to for specific courses and credits that transfer.

**PRIVATE:**
- Bellevue University, Bellevue, Nebraska or Online Program – Capella University, Online Programs – Cardinal Stritch, Milwaukee, WI – Franklin University, Online Programs – Lakeland College, Sheboygan, WI – Marian College, Fon du Lac, WI – Milwaukee School of Engineering Rader School of Business – Northland College, Ashland, WI – Upper Iowa

**UW:**
- UW-Platteville, UW-River Falls, UW-Stout, UW-Superior

 Credits may transfer to other institutions. Check with admissions advisors at institutions for specific course and/or credit transfers.

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