



**10-114-2 FINANCIAL SERVICES**  
**30-114-1 FINANCIAL SERVICES CUSTOMER REPRESENTATIVE**  
**2019-20 PROGRAM CURRICULUM CHECKLIST**  
**WISCONSIN INDIANHEAD TECHNICAL COLLEGE (WITC)**  
**ASHLAND\*, NEW RICHMOND\*, RICE LAKE\*, SUPERIOR\***  
**OUTREACH CENTERS: HAYWARD\*, LADYSMITH\***



\*Combination of Online, Your Choice, In-Person, and ITV (Interactive Television)

Name/ID					Date				
CATALOG NUMBER	COURSE TITLE	HOURS PER WEEK		CREDITS		FINANCIAL SERVICES CUSTOMER REPRESENTATIVE TECHNICAL DIPLOMA	FINANCIAL SERVICES ASSOCIATE DEGREE (Financial Aid Eligible)	DATE COMPLETED	TRANSFER OR GRADE
<b>FIRST TERM</b>									
10-101-101	Financial Accounting 1	5	hours per week	4	credits	Financial Services Customer Representative	Financial Services		
10-114-125	Personal Finance	3	hours per week	3	credits	Financial Services Customer Representative	Financial Services		
10-103-146	MS Word A	2	hours per week	1	credit	Financial Services Customer Representative	Financial Services		
10-103-151	MS Excel A	2	hours per week	1	credit	Financial Services Customer Representative	Financial Services		
10-103-152	MS Excel B Corequisite: 10-103-151 MS Excel A	2	hours per week	1	credit	Financial Services Customer Representative	Financial Services		
10-804-123	Math with Business Applications	3	hours per week	3	credits		Financial Services		
10-801-136	English Composition 1	3	hours per week	3	credits		Financial Services		
	<b>FIRST TERM TOTAL</b>					<b>10 Credits</b> Financial Services Customer Representative	<b>16 Credits</b> Financial Services		
<b>SECOND TERM</b>									
10-101-103	Financial Accounting 2 Prerequisite: 10-101-101 Financial Accounting 1	5	hours per week	4	credits		Financial Services		
10-114-107	Principles of Finance	3	hours per week	3	credits	Financial Services Customer Representative	Financial Services		
10-196-189	Team Building and Problem Solving	3	hours per week	3	credits		Financial Services		
10-103-106	MS PowerPoint	2	hours per week	1	credit	Financial Services Customer Representative	Financial Services		
10-801-198 or 10-801-196	Speech or Oral/Interpersonal Communication	3	hours per week	3	credits		Financial Services		
10-809-195	Economics	3	hours per week	3	credits		Financial Services		
	<b>SECOND TERM TOTAL</b>					<b>4 Credits</b> Financial Services Customer Representative	<b>17 Credits</b> Financial Services		



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<b>THIRD TERM</b>									
10-101-138	Budgeting and Cost Control Corequisite: 10-101-101 Financial Accounting 1 or 10-101-176 Financial Accounting 1A	2	hours per week	2	credits		Financial Services		
10-114-192	Principles of Insurance	3	hours per week	3	credits		Financial Services		
10-104-102	Marketing Principles	4	hours per week	3	credits		Financial Services		
10-104-104	Selling Principles	4	hours per week	3	credits		Financial Services		
10-105-125	Business Law	3	hours per week	3	credits		Financial Services		
	<b>THIRD TERM TOTAL</b>	16	hours per week	14	credits		<b>14 Credits</b> Financial Services		
<b>FOURTH TERM</b>									
10-114-103	Money and Banking	3	hours per week	3	credits		Financial Services		
10-114-150	Investments	3	hours per week	3	credits		Financial Services		
10-196-191	Supervision	3	hours per week	3	credits		Financial Services		
10-809-198 or 10-809-188	Introduction to Psychology or Developmental Psychology	3	hours per week	3	credits		Financial Services		
10-890-116	Job Quest	2	hours per week	1	credit		Financial Services		
	<b>FOURTH TERM TOTAL</b>	13	hours per week	13	credits		<b>13 Credits</b> Financial Services		
	<b>PROGRAM REQUIREMENTS</b>					<b>14 Credits</b> Financial Services Customer Representative	<b>60 Credits</b> Financial Services		

All prerequisite/corequisite courses must be completed with a grade point of 2.0 or better.

Revised 4/12/2019

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Select the curriculum checklist based on the academic year you begin enrollment in your program. Students admitted mid-year (January) and/or any student who takes courses out of sequence are not guaranteed course availability in all terms of the program. Enrollment in additional terms may be required to complete graduation requirements. Please be advised that low enrollment class sections may be cancelled. You will be contacted by Student Services with information on other class sections available in alternate formats.

WITC GENERAL STUDIES COURSE OPTIONS FOR WITC ASSOCIATE DEGREE PROGRAMS

Co-enrollment in 99-831-900 Writing Essentials may be recommended in addition to English Composition 1.

Specific General Studies courses are scheduled as requirements for this program. If you have completed General Studies coursework at another Wisconsin technical college, please refer to the Acceptable Transfer Course document at the following link (find your program) to see if your previous coursework will transfer <https://www.witc.edu/academic-programs/degree-programs-and-certificates/general-studies-courses/courses>. If you have completed General Studies coursework at WITC in a prior term, the same options will apply for your program requirements.

*GRADUATION REQUIREMENTS: Although your academic advisor can provide guidance, you are ultimately responsible for selecting courses that meet a program's graduation requirements. If you do not take courses in the recommended sequence above, it may delay your completion of graduation requirements. A program plan grade point average (GPA) of 2.0 in a 4.0 grade system is required to graduate.*

EARN CREDIT FOR WHAT YOU ALREADY KNOW: Visit <https://www.witc.edu/admissions/preparing-for-college/credit-for-prior-learning> for more information

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