

# PRINCIPLES OF FINANCE

**MIS03 04081**

*An instructor must hold the License Code: 04006-CTE Marketing Education to be qualified to teach this course.*

*Principles of Finance* expands student understanding of finance. Students develop their knowledge and skills in such areas as business law, communication skills, compliance, customer relations, economics, financial analysis, financial-information management, human resources management, marketing, professional development, and selling. Emphasis is placed on the analysis and purchase of securities and investments, as well as the need for effective customer relationship management and information management in finance.

*Principles of Finance* is an entry level course in The Business Administration Program of Study for Marketing Education.

**Credit** ½ credit

**Level** Grades 9-12

## Quarter 1

### Student Competencies

	Explain the goals of the Introduction to Finance course
	Discuss classroom operations and procedures
	Discuss the purposes of CTSO and its activities
7.3.2	Describe the nature of financial institutions (FI:336) (CS)
7.3.3	Explain types of financial markets (e.g., money market, capital market, insurance market, commodities markets, etc.) (FI:337) (SP)
12.8.5	Describe types of retail/business banking products and services (PD:154) (CS)
12.8.6	Describe the nature of retail/business banking processes (PD:204) (CS)
12.8.7	Describe the nature of the insurance industry (PD:157) (CS)
20.4.7	Describe components of automobile insurance coverage (SE:406) (SP)
20.4.8	Discuss the nature of health insurance coverage (SE:412) (SP)
20.4.9	Discuss components of homeowners'/renters' insurance (SE:407) (SP)
20.4.10	Discuss the nature of life insurance (SE:419) (SP)
20.4.11	Explain the nature of liability insurance (SE:405) (SP)
20.4.12	Explain the nature of bonds (SE:428, QS LAP 33) (SP)
20.4.13	Explain the nature of stocks (SE:421, QS LAP 34) (SP)
20.4.14	Describe the nature of mutual funds (SE:429, QS LAP 35) (SP)

	7.3.8	Describe sources of securities information (FI:274, QS LAP 36) (CS)
	12.8.8	Explain causes of stock price fluctuations (PD:238, QS LAP 40) (SP)
<b>Quarter 2</b>		
	7.3.10	Explain factors to consider when selecting investments (FI:279, QS LAP 41) (SP)
	7.3.11	Explain fundamental analysis used in making investment decisions (FI:280, QS LAP 42) (SP)
	7.3.12	Assess securities' fundamentals (FI:282, QS LAP 44) (SP)
	7.3.13	Explain strategies for selecting investments (FI:283, QS LAP 45) (SP)
	7.3.14	Choose investments based on fundamental analysis (FI:284, QS LAP 46) (SP)
	12.8.9	Describe how securities are traded (PD:236, QS LAP 47) (SP)
	12.8.10	Discuss the nature and scope of investment banking (PD:198) (SP)
	1.1.3	Discuss legal considerations in the finance industry (BL:133) (SP)
	7.3.15	Discuss the nature and scope of convergence/consolidation in the finance industry (FI:573) (SP)
	4.4.2	Describe the nature of taxes (EC:072, LAP-EC-027) (SP)
	1.1.4	Discuss the effect of tax laws and regulations on financial transactions (BL:134) (SP)
	4.6.3	Describe the economic impact of inflation on business (EC:083, LAP-EC-028) (SP)
	4.6.4	Discuss the impact of a nation's unemployment rates (EC:082, LAP-EC-029) (SP)
	4.6.5	Explain the economic impact of interest-rate fluctuations (EC:084) (SP)
	7.4.10	Describe the relationship between economic conditions and financial markets (FI:574) (SP)
	4.7.1	Explain the nature of global trade (EC:016, LAP-EC-004) (SP)
	7.4.11	Explain the nature and scope of financial globalization (FI:575) (SP)
	3.1.8	Explain the responsibilities of finance professionals in providing client services (CR:012) (CS)
	3.1.2	Demonstrate a customer-service mindset (CR:004, LAP-CR-004) (CS)
	3.1.4	Reinforce service orientation through communication (CR:005) (CS)
		Course Assessment
		Final Exam