Financial Planning and Risk Management Standards

"FIN-BII-6 Demonstrate an understanding of investment instruments and their proper use in financial planning, retirement planning, estate-planning and wealth management.

   6.1 Analyze financial needs and goals to determine financial requirements.
   6.2 Evaluate criteria for choosing a savings or investment instrument, including opportunity cost.
   6.12 Assess the effects of taxes on different investment options (i.e. capital gains and losses versus ordinary income.
   6.13 Describe the issues to be considered when planning for retirement.
   6.14 Identify and explain basic components of an employment retirement package.
   6.15 Explain the investment opportunities related to workplace

L11-12RST9: Synthesize information from a range of sources (e.g., texts, experiments, simulations) into a coherent understanding of a process, phenomenon, or concept, resolving conflicting information when possible.

FIN-BII-1 Demonstrate employability skills required by business and industry. The following elements should be integrated throughout the content of this course.

   1.2 Demonstrate creativity with multiple approaches to ask challenging questions resulting in innovative procedures, methods, and products.

FIN-FL-12 Explore how related student organizations are integral parts of career and technology education courses through leadership development, school and community service projects, entrepreneurship development, and competitive events.

   12.5 Explore the competitive events related to the content of this course and the required competencies, skills, and knowledge for each related event for individual, team, and chapter competitions.