Banking, Insurance and Investing

Financial Services Careers Standards

FIN-BII-11 Students will identify and evaluate careers in the financial services industry.

11.1 Describe the skills and job responsibilities for careers in banking (i.e. loan officer, teller, customer service representative, data processor, trust officer, mortgage broker, branch manager, marketing, human resource management, IT, training and development).

11.2 Identify and summarize education and licensing requirements for careers in banking.

11.3 Describe the skills and job responsibilities for careers in investing (i.e. broker, investment advisor, financial planner, commodities representative, financial consultant, trader, mutual fund manager.)

11.4 Identify and describe education and licensing requirements for careers in investing.

11.5 Describe the skills and job responsibilities for careers in insurance, such as an agent, a claims adjuster, an actuary, a claims examiner, a customer service representative, a rater, and an underwriter.)

11.6 Identify and explain education and licensing requirements for careers in insurance.

L1.1-12RH7: Integrate and evaluate multiple sources of information presented in diverse formats and media (e.g., visually, quantitatively, as well as in words) in order to address a question or solve a problem.