

NORTH CAROLINA CAREER AND TECHNICAL EDUCATION STANDARDS

Business, Finance, and Marketing Education

Grade: Grade 9 - 12

Course: Financial Planning I **New**

NCCTE.2020.BF21 - Financial Planning I

NCCTE.2020.BF21.01.00 - Understand the basics of finance.

NCCTE.2020.BF21.01.01 - Utilize time management skills to determine best options/outcomes.

NCCTE.2020.BF21.01.02 - Describe the need for financial information.

NCCTE.2020.BF21.01.03 - Explain the role of finance in business.

NCCTE.2020.BF21.01.04 - Describe the role of financial institutions.

NCCTE.2020.BF21.01.05 - Discuss employment opportunities in the finance industry (accounting).

NCCTE.2020.BF21.02.00 - Understand the basics of investing.

NCCTE.2020.BF21.02.01 - Explain types of financial markets (e.g., money market, capital market, insurance market, commodities markets, etc.).

NCCTE.2020.BF21.02.02 - Describe types of financial-services providers.

NCCTE.2020.BF21.02.03 - Describe types of retail/business banking products and services.

NCCTE.2020.BF21.02.04 - Explain types of investments.

NCCTE.2020.BF21.02.05 - Discuss employment opportunities in the finance industry.

NCCTE.2020.BF21.03.00 - Understand financial analysis.

NCCTE.2020.BF21.03.01 - Utilize sources of securities information to make informed financial decisions.

NCCTE.2020.BF21.03.02 - Acquire fundamental knowledge of investment analysis and selection to make prudent investment decisions.

NCCTE.2020.BF21.03.03 - Select investments to generate revenue for clients.

NCCTE.2020.BF21.03.04 - Acquire knowledge of securities products and benefits to support workplace activities.

NCCTE.2020.BF21.03.05 - Discuss employment opportunities in the finance industry (investment/securities).

NCCTE.2020.BF21.04.00 - Understand law and security measures in business.

NCCTE.2020.BF21.04.01 - Determine the relationship between government and business.

NCCTE.2020.BF21.04.02 - Discuss legal considerations in the finance industry.

NCCTE.2020.BF21.04.03 - Explain routine security precautions.

NCCTE.2020.BF21.04.04 - Follow established security procedures/policies.

NCCTE.2020.BF21.04.05 - Explain information privacy, data security, and confidentiality considerations in business.

NCCTE.2020.BF21.04.06 - Discuss employment opportunities in the finance industry (corporate finance).

NCCTE.2020.BF21.05.00 - Understand the impact of the economy on financial decisions

NCCTE.2020.BF21.05.01 - Understand economic indicators to recognize economic trends and



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conditions.

NCCTE.2020.BF21.05.02 - Understand financial markets to recognize their importance in business.

NCCTE.2020.BF21.05.03 - Determine global trade's impact on business decision-making to acquire insight into the global forces affecting business.

NCCTE.2020.BF21.05.04 - Explain causes of stock price fluctuations.

NCCTE.2020.BF21.05.05 - Discuss employment opportunities in the finance industry

