

# Introduction to Financial Services

Course Syllabus 2015-2016

## COURSE DESCRIPTION

This course provides students with in-depth coverage of investing in stocks, bonds, mutual funds and real estate. Students will also learn the importance of living a debt free life.

## COURSE OBJECTIVES

Upon the successful completion of this course, the student will be able to:

1. Identify various careers available in the financial services industry.
2. Analyze pros and cons for various jobs.
3. Determine career fields that match personal interest.
4. Understand the need for investing.
5. Explain how money grows through compounding.
6. Compare and contrast investment options and the risks involved.
7. Describe types of mutual funds, how they work, and how to invest in them.
8. Analyze sources and types of credit.
9. Explain the impact of credit reporting and FICO scoring.
10. Explain risk protection.
11. Analyze property and liability insurance.

Describe the need for health, life and other types of insurance.

## REQUIRED TEXT & MATERIALS

- Foundations in Personal Finance Workbook pages provided
- Pen (Blue or black ink only) or Pencil, Paper, Binder

## EVALUATION CRITERIA

Grades are calculated using Total Points composed of:

Daily work, projects, assessments, participation

Final exams are 20% of the semester grade.

### MSD Warren Township Grade Scale

100-92.5=A  
92.4-89.5=A-  
89.4-86.5=B+  
86.4-82.5=B  
82.4-79.5=B-  
79.4-76.5=C+  
76.4-72.5=C  
72.4-69.5=C-  
69.4-66.5=D+  
66.4-62.5=D  
62.4-59.5=D-  
Below 59.5=F

## COURSE OUTLINE

Week	Chapters	Assignments
1	Syllabus PBIS Chapter 1	Intro to Ramsey
2	Chapter 1 Chapter 2	Chapter 1 Test Power of Compound Interest
3	Chapter 2 Cash Flow	Chapter 2 Test
4	Cash Flow ROI	CashFlow/ROI Test
5	Chapter 3 Understanding Investments Chapters ½	Chapter 3 quiz Act your wage?
6	Chapter 4	Chapter 4 test
7	Chapter 5	Chapter 5 Quiz Cash Flow?
8	Chapter 6	Chapter 6 Quiz Career Summary
9	Chapter 8 Stock Vocab UI – Chapters 3-7	Chapter 8 Quiz
10	UI – Chapters 8-14	
11	Stock Math UI – Chapters 15-18	Stock Math/Vocab Quiz
12	Can you retire TVM	Movie Guide
13	Rule of 72	TVM/Rule of 72 Test
14	Bond Vocab UI Chapters 19-21 Bond Math	

15	Bonds Mutual Fund Vocab & Math Mutual Fund Movie UI Chapters 22-23	Bond Test
16	Act your wage/Cash Flow	
17	RE Vocab RE Contract RE Loan App	RE Quiz
18	Cash Flow Review for final	
19	FINALS	