

High School Name:  
Community College Name:  
CTE Program of Study Name:  
Date:

Portland Community College  
Finance/Accounting  
12/1/2016

## Finance Cluster

2016

### Skills-to-Course Matrix

**Instructions:** 1) Enter your high school name above. 2) Enter the community college name. 3) Enter the Program of Study name. 4) Enter the date. 5) Click on Course 1, Course 2, etc. below and replace with your POS course names (or numbers). 6) Check those courses that trigger the TSA for this POS. 7) Finally, check those standards that are taught with intent and purpose, and are assessed in each course. Note: You only need to use the optional Focus Area tabs below if you are using those skill sets for multiple options in a Program of Study or if you want to use another set of industry validated standards.

#### Cluster Knowledge and Skills (CTE standards)

CCTC	Code Number	KS Statement	BA 101 TSA?	BA 111 TSA?	BA 131 TSA?	BA 177 TSA?	BA 205 TSA?	BA 211 TSA?	BA 212 TSA?	BA 228 TSA?	BA 285 TSA?	CAS 122 TSA?
FN 01	FN01	Utilize mathematical concepts, skills and problem solving to obtain necessary information for decision making in the finance industry.	X	X	X	X	X	X	X	X	X	X
FN 02	FN02	Utilize tools, strategies and systems to plan, monitor, manage and maintain the use of financial resources.		X	X	X		X	X	X		X
FN 03	FN03	Plan, staff, lead and organize human resources in finance to enhance employee productivity and job satisfaction.									X	
FN 04	FN04	Determine effective tools, techniques and systems to communicate and deliver value to finance customers.	X		X		X		X			
FN 05	FN05	Create and maintain positive, ongoing relationships with finance customers.					X				X	
FN 06	FN06	Plan, monitor and manage day-to-day activities to ensure effective and efficient finance operations.				X			X		X	
FN 07	FN07	Implement safety, health and environmental controls to ensure a safe and productive finance work workplace.									X	
FN 08	FN08	Describe and follow laws, regulations and ethical standards that affect finance operations and transactions.	X								X	
FN 09	FN09	Plan, manage and maintain the use of financial resources to protect solvency.				X				X		
FN 10	FN10	Plan, organize and manage a finance organization/department.			X							
FN 11	FN11	Plan, monitor and manage day-to-day activities required to sustain continued business functioning.		X	X	X						
FN 12	FN12	Access, evaluate and disseminate financial information to enhance financial decision-making processes.		X	X		X					
FN 13	FN13	Manage a financial product or service mix in order to respond to market opportunities.										
FN 14	FN14	Employ financial risk-management strategies and techniques used to minimize business loss.				X						

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## Accounting Focus Area

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## Banking Services Focus Area

2016

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#### Focus Area Knowledge and Skills (CTE standards)

CCTC	Code Number	KS Statement	BA 101 TSA?	BA 111 TSA?	BA 131 TSA?	BA 177 TSA?	BA 205 TSA?	BA 211 TSA?	BA 212 TSA?	BA 228 TSA?	BA 285 TSA?	CAS 122 TSA?
FN-BFN 1	FNBK01	Describe and follow laws and regulations to manage business operations and transactions in corporate finance.										
FN-BFN 2	FNBK02	Manage the use of financial resources to ensure business stability.		X								
FN-BFN 3	FNBK03	Utilize career-planning concepts, tools and strategies to explore, obtain and/or develop in a corporate finance career.	X									
FN-BFN 4	FNBK04	Employ risk-management strategies and techniques in corporate finance to minimize business loss.										
FN-BNK 1	FNBK05	Describe and follow laws and regulations to manage business operations and transactions in the banking services industry.										
FN-BNK 2	FNBK06	Create and maintain positive, ongoing relationships with banking customers.				X					X	
FN-BNK 3	FNBK07	Manage the use of financial resources to enhance banking performance.								X		
FN-BNK 4	FNBK08	Demonstrate the use of banking technology and equipment.										
FN-BNK 5	FNBK09	Plan, monitor and manage the day-to-day activities within a banking organization to ensure secure operations.							X	X		
FN-BNK 6	FNBK10	Utilize career-planning concepts, tools and strategies to explore, obtain and/or develop a career in banking services.	X									
FN-BNK 7	FNBK11	Determine client needs and wants and respond through planned, personalized communication to guide purchase decisions and enhance future business opportunities in banking services.				X					X	

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## Business Finance Focus Area

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Insurance Focus Area

2016

Skills-to-Course Matrix

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Focus Area Knowledge and Skills (CTE standards)

CCTC	Code Number	KS Statement	BA 101 TSA?	BA 111 TSA?	BA 131 TSA?	BA 177 TSA?	BA 205 TSA?	BA 211 TSA?	BA 212 TSA?	BA 228 TSA?	BA 285 TSA?	CAS 122 TSA?
FN-INS 1	FNIN01	Describe and follow laws and regulations to manage business operations and transactions in the insurance industry.										
FN-INS 2	FNIN02	Plan, monitor and manage day-to-day insurance organization activities.								X		
FN-INS 3	FNIN03	Utilize career-planning concepts, tools and strategies to explore, obtain and/or develop a career in insurance.	X									
FN-INS 4	FNIN04	Demonstrate underwriting techniques and strategies to evaluate the risk posed by potential insurance clients.										
FN-INS 5	FNIN05	Determine client needs and wants and respond through planned, personalized communication to guide purchase decisions and enhance future insurance business opportunities.					X					

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Securities & Investments **Focus Area**

**2016**

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**Focus Area Knowledge and Skills (CTE standards)**

CCTC	Code Number	KS Statement	BA 101 TSA?	BA 111 TSA?	BA 131 TSA?	BA 177 TSA?	BA 205 TSA?	BA 211 TSA?	BA 212 TSA?	BA 228 TSA?	BA 285 TSA?	CAS 122 TSA?
FN-SEC 1	FNSC01	Describe and follow laws and regulations to manage business operations and transactions in the securities and investments industry.										
FN-SEC 2	FNSC02	Manage the use of financial resources to perform key duties in the securities and investments industry.									X	
FN-SEC 3	FNSC03	Plan, monitor and manage day-to-day securities and investments operations.									X	
FN-SEC 4	FNSC04	Utilize career-planning concepts, tools and strategies to explore, obtain and/or develop in a securities and investments career.	X									
FN-SEC 5	FNSC05	Determine client needs and wants and respond through planned, personalized communication to guide purchase decisions and enhance future securities and investments opportunities.					X				X	