



Western Technical College

10114164 Application of Financial Concepts

Course Outcome Summary

Course Information

Description	This is a capstone course that incorporates the financial concepts addressed in the finance program. There will be practical application projects in the areas of insurance, investing and banking. Individual student projects will require the student to apply knowledge gained throughout the program in business simulations, preparing the students for a career in finance. Public presentations are also part of this class.
Career Cluster	Finance
Instructional Level	Associate Degree Courses
Total Credits	3
Total Hours	54

Pre/Corequisites

Prerequisite	10116162 Risk Management
Prerequisite	10114187 Lending Principles
Prerequisite	10114177 Investment Principles

Textbooks

No textbook required.

Success Abilities

1. Cultivate Passion: Enhance Personal Connections
2. Cultivate Passion: Expand a Growth-Mindset
3. Cultivate Passion: Increase Self-Awareness
4. Live Responsibly: Develop Resilience
5. Live Responsibly: Foster Accountability
6. Refine Professionalism: Act Ethically

7. Refine Professionalism: Improve Critical Thinking
8. Refine Professionalism: Participate Collaboratively
9. Refine Professionalism: Practice Effective Communication

Experiential Learning

1. Community Based Learning Project
2. Work Based Learning

Program Outcomes

1. Create reports.
2. Analyze investments.
3. Develop short and long term personal goals.
4. Apply financial laws and regulations.
5. Demonstrate an understanding of the role of financial institutions.

Course Competencies

1. Demonstrate professionalism.

Assessment Strategies

- 1.1. Demonstration

Criteria

You will know you are successful when

- 1.1. you exhibit professional behavior during class projects.
- 1.2. you dress professionally for class projects.
- 1.3. you interact comfortably with business professionals.

Learning Objectives

- 1.a. Define what it means to be a professional.
- 1.b. Describe characteristics of a professional.
- 1.c. Understand the importance of professionalism.
- 1.d. Exhibit professionalism during class projects.

2. Practice the steps involved in obtaining professional employment.

Assessment Strategies

- 2.1. Resume and Cover Letter Assignment (70% or higher)
- 2.2. Job Interview Assignment (70% or higher)

Criteria

You will know you are successful when

- 2.1. you create a professional, error-free resume.
- 2.2. you create a professional, error-free cover letter.
- 2.3. you successfully participate in a job interview by Human Resource Management students.

Learning Objectives

- 2.a. Explain the steps involved in obtaining professional employment.
- 2.b. Create a professional, error-free resume and cover letter.
- 2.c. Experience the process of a job interview.

3. Create research document for local financial institutions.

Assessment Strategies

- 3.1. Written Product
- 3.2. Presentation

Criteria

You will know you are successful when

- 3.1. you research the fair market value for specific real estate properties.
- 3.2. you calculate the standard deviation for the fair market value compared to the appraised value of specific real estate properties.
- 3.3. you analyze the results of your research.
- 3.4. you prepare a report to showcase results.
- 3.5. you present your findings to local financial institutions in a professional manner.

Learning Objectives

- 3.a. Investigate the fair market values from county websites for specific real estate properties.
- 3.b. Compare the fair market values to the appraised values of specific real estate properties and calculate the standard deviation.
- 3.c. Create a professional, well-written report analyzing research results for local financial institutions.
- 3.d. Present research report to local financial institutions in a professional manner.

4. Explore areas of the financial services industry through personal interviews.

Assessment Strategies

- 4.1. Presentation
- 4.2. Written Product

Criteria

You will know you are successful when

- 4.1. you interview three business professionals in different areas of the financial services industry.
- 4.2. you create appropriate questions to ask business professionals.
- 4.3. you describe the job duties in several areas of the financial services industry.
- 4.4. you identify job skills needed in the financial services industry.
- 4.5. you professionally present information learned during personal interviews.

Learning Objectives

- 4.a. Demonstrate the ability to have a professional conversation with a business professional.
- 4.b. Differentiate between the job duties in different areas of financial services.
- 4.c. Describe job skills that are needed in the financial services industry.
- 4.d. Present relevant information discovered during personal interviews.

5. Demonstrate the ability to be a constructive member of a team.

Assessment Strategies

- 5.1. Demonstration
- 5.2. Peer Evaluation

Criteria

You will know you are successful when

- 5.1. you successfully work with other teammates.
- 5.2. you overcome the challenges of working on a team.
- 5.3. you provide constructive feedback to teammates.
- 5.4. you respond to constructive feedback from teammates.

Learning Objectives

- 5.a. Understand the difficulties associated with being part of a team.
- 5.b. Recognize different ways to accomplish team goals.
- 5.c. Be able to evaluate teammates by providing constructive feedback.

6. Research and present useful financial information to fellow students.

Assessment Strategies

- 6.1. Presentation
- 6.2. Peer Evaluation

Criteria

You will know you are successful when

- 6.1. you research a financial topic and locate useful information.
- 6.2. you create a professional presentation.
- 6.3. your team makes a presentation to fellow students.

Learning Objectives

- 6.a. Figure out an appropriate topic to research and share with students.
- 6.b. Research important financial facts that will be helpful to students.
- 6.c. Demonstrate how to make a financial presentation.

7. Analyze investment information.

Assessment Strategies

- 7.1. Written Product
- 7.2. Presentation
- 7.3. Peer Evaluation

Criteria

You will know you are successful when

- 7.1. you locate the appropriate information to analyze.
- 7.2. you determine how to analyze the investment information.
- 7.3. you choose the appropriate indexes to compare the information to.
- 7.4. you create a professional report analyzing the investment information.
- 7.5. you present investment analysis to the Foundation Investment Committee.

Learning Objectives

- 7.a. Determine the best way to do an investment analysis.
- 7.b. Research the possible investment indexes available and choose the most appropriate one for investment analysis.
- 7.c. Conduct a professional presentation to the Foundation Investment Committee.