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EARLY CAREER EXPLORATION

# Discover Financial Services

## Lesson Plan

**Discover Financial Services** is a classroom activity designed to introduce students to various careers in four broad sectors of finance: **Banking, Insurance, Accounting, and Securities & Investments**. Students work collaboratively and individually to incorporate research, creativity, and presentation skills through the creation of an infographic, which is a representation of their understanding of a career in a financial services area. The activity is designed for all levels of high school students, and aligns with the Ohio Learning Standards for Financial Literacy. Educators will be provided with lesson plans and online resources to facilitate the **Discover Financial Services** activity in their classroom, which generally takes two to three 50-minute class periods to complete.

### Goal

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The goal of the **Discover Financial Services** activity is to have students explore the roles of financial experts in providing guidance and advice on a wide variety of financial issues, and discover the variety of products and services financial institutions offer to address consumer financial responsibility. Students will choose a local institution within a financial services sector and explore a specific role. They will create an engaging infographic that illustrates their understanding of career opportunities in that sector, highlighting how these roles benefit both consumers and professionals in the field.

### Class Periods

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The **Discover Financial Services** activity is designed to be completed in two to three class periods, but can be spread out to additional in-class activities.

Instructions and a rubric to guide students through the creation process of an infographic are included in the **Discover Financial Services Student Handout** which can be downloaded from the [Discover Financial Services](#) page.

### Resources

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Students will use the **Discover Financial Services** website to create their product, which includes websites and videos for their research. The infographic can be created using standard/free productivity or visual design applications (Powerpoint, Google Slides, Canva, Piktochart, Photoshop) or with chart paper and markers.



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DISCOVER FINANCIAL SERVICES ACTIVITY

# Students Create Their Own Infographic

## Procedure

### ***STEP 1 on Student Handout***

*(~50 minutes / One class period or for homework)*

Prior to creating the **Discover Financial Services** infographic, ask students to review the **Discover Financial Services** website and respond to some or all of the questions. The research can be assigned as homework or facilitated as a class activity. Students are then expected to share their research and responses within a small group in class during **STEP 2 on Student Handout**.

## KEY CONCEPTS TO UNCOVER

[Ohio Financial Literacy Learning Standards: Topics \(Planning and Money Management and Informed Consumer\)](#).

### ***STEP 2 on Student Handout***

*(~30 minutes / ½ class period or for homework)*

Students will collaboratively share their research and questions from **STEP 1** in a small group. Consider grouping students who chose different areas of financial services to explore so all students in the group have a general understanding of each area (sub-clusters and/or roles).

#### **ANTICIPATORY SET**

In their assigned groups, have students discuss what it means to them to be “financially responsible.” Lead the discussion by asking:

- What does it look like to be financially responsible? What are the positive effects of these actions?

- What does it look like to be financially irresponsible? What are the negative effects of these actions?
- How can experts in financial services help consumers to be financially responsible to avoid negative consequences?

## KEY CONCEPTS TO UNCOVER

[Ohio Financial Literacy Learning Standards: Topics \(Financial Responsibility and Decision Making, and Planning and Money Management\)](#).

### ***STEP 3 on Student Handout***

*(~30 minutes / One class period / More time can be allocated if needed for design and follow up activity)*

Students will then individually create an infographic to showcase facts and data about one area in the financial services career field.

Infographics should use a variety of visuals like charts, graphs, icons, and illustrations to make the information more appealing and memorable. Students will be assessed on both the content and the presentation of the topic.

- Students should use the **Student Handout** as a guide for their work.
- Students should self-assess their final infographic with the provided [rubric](#) in the **Student Handout**.



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DISCOVER FINANCIAL SERVICES ACTIVITY

# Students Present & Submit Their Infographic

## Suggested Follow-up Activity

If time permits, encourage the class to respond to the student's questions about financial services careers and reflect/share/summarize their learning through a reflection activity or presentation of their infographic.

- What was the most interesting information you learned about in financial services careers?
- Which field are you most curious about and why?
- What was the most surprising information you learned, and why?
- Of all the infographics, which did you like most, and why?
- What questions still remain for you?
- How did the **Discover Financial Services** infographic impact your interest in financial services careers?
- **Call to Action:** Encourage students to explore careers in financial services or learn more about their local institution.



**Discover More!**

[talent.greatercle.com/program/discover-financial-services](https://talent.greatercle.com/program/discover-financial-services)