



Greater
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FINANCIAL SERVICES

DISCOVER FINANCIAL SERVICES

Student Handout

Welcome to Discover Financial Services.

This project is designed to introduce you to various careers in four key sectors of finance: Banking, Insurance, Accounting, and Securities & Investments. Throughout this activity, you'll have the opportunity to work both collaboratively and individually, using your research, creativity, and presentation skills to create an infographic. This infographic will showcase your understanding of a career in one of these financial services areas. Get ready to explore the world of finance and discover the many career possibilities it offers!

Following the Steps below to complete your Discover Financial Services infographic. You can access all of the resources for this activity from the Discover Financial Services webpage on the Early Career Exploration Portal.



Go to Discover
Financial Services

talent.greatercle.com/program/dfs

Step One: Research Services and Careers

1. Review the Advance CTE Financial Services career clusters resource. Read the Cluster Defined and each of the descriptions in the Sub-Clusters. For this assignment, focus on the following Sub-Clusters: Banking & Credit, Insurance, Accounting, and Financial Strategy & Investments. Answer the following questions, and be prepared to share with an assigned group in class.
 - Can you identify an expert in each of the following clusters that work in that area? It could be a family member, relative, friend, a person that's in the news, or even a fictional character in each cluster.
 - How does the expert contribute to the consumer in this area? (For example, if you know someone in banking, what is the service they provide to the consumer? Are they responsible for approving home loans through the bank, or managing a local branch?)
2. For each sub-cluster, identify how you may interact with this financial service as a consumer, either now or in the future. If you are unsure, ask a parent or teacher how the experts in each sub-cluster provide a service for them.
3. Visit O*NET Online and browse specific roles in each sub-cluster to gain an understanding of types of careers, and what service is provided to you as a consumer. Click on a specific occupation for a more detailed description of each career.
4. Using O*NET Online, look deeper into a specific career in a sub-cluster. These will be listed and linked in the "Occupation" column. Select ONE that has a "Bright Outlook" (with a sunshine graphic next to it). For example, in the Accounting or Financial Strategies and Investments sub-cluster, Personal Financial Advisors show a bright job outlook. Click on the link for the role and explore all the tasks, activities, knowledge, skills, abilities, education, certifications, trends, salary, etc. for that specific career.
5. With time, watch the following videos to get an overview of Financial Services career opportunities.
 - Finance and Insurance Overview | Career Cluster / Industry Video Series
 - Finance - CAREER CLUSTERS
 - FINANCE PROFESSIONAL EXPLAINS: CAREERS IN FINANCE Banking, Financial Services, Accounting, FP&A



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STEP TWO: Collaborate & Discuss

1. Get into your assigned small group and share your responses to the questions from STEP 1.



2. After everyone has shared, discuss the following topics:

- 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?

STEP THREE: Create & Communicate Infographic

1. Watch the video What Makes an Effective Infographic? and visit 10 Tips for a Great Infographic
2. Select a tool to use to create your infographic. 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. Canva has many infographic templates to get you started or give you ideas.
3. Using the web resources from STEP 1 and those below, include the following information on your infographic:
 - Your selected Sub-Cluster and Career as your title and subheading
 - (Banking, Insurance, Accounting, and Securities & Investments)
 - The Consumer Services provided by your selected career (Jobs and Responsibilities)
 - The Knowledge, Skills, and Abilities required to become an expert in your chosen career (Education and Training)
 - The Current Trends/ Future Outlook of your chosen career, including BOTH local and national salaries and outlook (Salary, Job Growth)
 - Local Institutions and Companies that provide a career path to your chosen career (Opportunities)
4. Your infographic design should be:
 - A single page/one slide.
 - Be exportable into one of these preferred file formats (.jpg/.pdf/.ppt/.png).
 - Clear and concise.
 - Have a consistent design with engaging visuals to represent your data.
5. Ask your teacher how to save or upload your Discover Financial Services infographic.



Infographic Rubric

Use this rubric to ensure your Discover Financial Services infographic includes all required elements.

	3	2	1
Job Role / Sub-Cluster & Career (Banking, Insurance, Accounting, and Securities & Investments)	One specific job role from one of the financial services careers sub-clusters is highlighted.	A financial services sub-cluster is identified, but infographic may not include a specific role in that area.	The overall field of financial services is included.
Consumer Services (Jobs and Responsibilities)	A thorough explanation of what service the chosen career provides to the consumer is included.	The overall explanation included general services, but may lack specific details about specific jobs or services.	Some general information about financial services is included.
Knowledge, Skills, & Abilities (Education and Training)	Required education, certifications, and skills needed to be an expert in the chosen field is included.	Some job requirements are included.	Minimal requirements are included.
Current Trends/ Future Outlook (Salary, Job Growth)	National AND local salary averages and job growth potential are included.	National OR local salary averages and job growth potential are included.	Future outlook or salary averages are included.
Local Institutions & Companies (Opportunities)	Local colleges or universities and companies are represented to demonstrate an education path and career placement potential.	Either a local institution or company is included, but not both.	Some information about a career path is included.
Data Accuracy (Research)	All data presented is accurate and well-researched.	Good research that includes most required elements.	Some research, but missing key elements.
Clarity & Conciseness	The infographic is easy to understand at a glance. The focus is on the most important takeaways and uses clear, concise language	Overall, good use of visuals and organization.	Some visuals and organization, but lacks clarity or is disorganized.
Descriptive Title & Subheadings	A descriptive title and subheadings are used and helps the audience understand the main point of the infographic. (Most important labels are larger to attract the attention of the viewer.)	Titles and subheadings are included to label the content areas.	Design lacks titles or subheadings.
Consistent Design	A consistent, thematic color scheme, font choices, and layout enhances the overall visual appeal of the infographic.	Some mixing of colors, fonts, and layout occurred, making the design somewhat inconsistent.	Too many mixes of styles and colors. Inconsistent design.
Engaging Visuals	A variety of visuals like charts, graphs, icons, and illustrations make the information more appealing and memorable.	Some use of visuals.	Lacking visuals to communicate messages.
Total= ___/30 points			