

3rd Grade Career Development
Activity #6: Finance Careers
Estimated time 30-45 minutes

National Career Development Guidelines Indicators

ED1 - Attain educational achievement and performance levels needed to reach your personal and career goals

- ED1.K7 - Recognize that your educational achievement and performance can lead to many workplace options
- ED1.K8 - Recognize that the ability to acquire and use information contributes to educational achievement and performance

ED2 - Participate in ongoing, lifelong learning experiences to enhance your ability to function effectively in a diverse and changing economy

- ED2.K3 - Recognize the importance of being an independent learner and taking responsibility for your learning

CM3 - Use accurate, current, and unbiased career information during career planning and management

- CM3.K2 - Recognize that career information includes occupational, education and training, employment, and economic information and that there is a range of career information resources available
- CM3.K4 - Identify several ways to classify occupations

CM4 - Master academic, occupational, and general employability skills in order to obtain, create, maintain, and/or advance your employment

- CM4.K4 - Recognize that many skills are transferable from one occupation to another

Goal:

Students will investigate careers in the **Finance** Career Cluster.

Objectives:

- Understand that a career cluster is a grouping of occupations based on commonalities
- Recognize that the **Finance** Career Cluster includes careers that encompass services for financial and investment planning, banking, insurance, and business financial management.
- Investigate careers in the **Finance** Career Cluster.

Materials:

- 3rd Grade Career Development Activity #6– **Finance Careers: Careers in Finance** handout #1
- 3rd Grade Career Development Activity #6– **Finance Careers: Word Search** handout #2
- 3rd Grade Career Development Activity #6– **Finance Careers: Word Search** answer sheet
- Writing Materials

Activity:

1. “Today we’re going to learn about occupations in the Finance Career Cluster. Does everyone remember what a Career Cluster is? **A career cluster is a grouping of occupations based on things they have in common.**”
2. “The Finance Career Cluster includes jobs that relate to services for financial and investment planning, banking, insurance, and business financial management.” *Write this on the board.*
3. “What do you think is one of the most common things anybody has to do to pay for things? Manage finances.” *Write this on the board.* “What are finances? Right! Money. Do you have any finances? How do you manage them?” *Let students discuss their allowances (birthday money) and how they manage their own finances: What they have to save for; what they’re allowed to spend, what types of things they can buy with their money.*
4. “It can be really complicated managing money, can’t it? Maybe that’s why there are so many people who work in jobs that help people manage their finances.” *Distribute the **Finance Careers: Careers in Finance** handout #1 to students. Go over each of the occupations on the list. Ensure students understand the concepts before moving to another.*
5. *Once students have gone over the list, distribute the **Finance Careers: Word Search** handout #2 to students. Explain the directions and answer any questions about the handout. Ensure they understand the directions. Allow time for students to complete the assignment. Walk around the room and offer assistance to students.*
6. *Once students have completed the handout, go over the answers and collect the handouts.*

Evaluation:

Students will be evaluated on their participation and on their handouts.

Handout #1

Finance Careers: Careers in Finance 3rd Grade Career Development: Activity #6

Personal Financial Advisors assess the financial needs of individuals, providing them a wide range of options for their investment decisions.

Credit Checkers investigate the history and credit standing of individuals or businesses applying for credit. They telephone or write to credit departments of business and service establishments to obtain information about their applicant's credit standing.

Credit Analysts analyze credit data and financial statements of individuals or firms to determine the degree of risk involved in extending credit or lending money. They prepare reports with credit information for use in decision making.

Loan Counselors provide guidance to prospective loan applicants who have problems qualifying for traditional loans.

Tax Collectors verify and investigate delinquent accounts claims, locate assets and decide how to collect owed taxes.

Revenue Agents specialize in tax-related accounting work for the U.S. Internal Revenue Service (IRS) and for equivalent agencies at the state and local government levels.

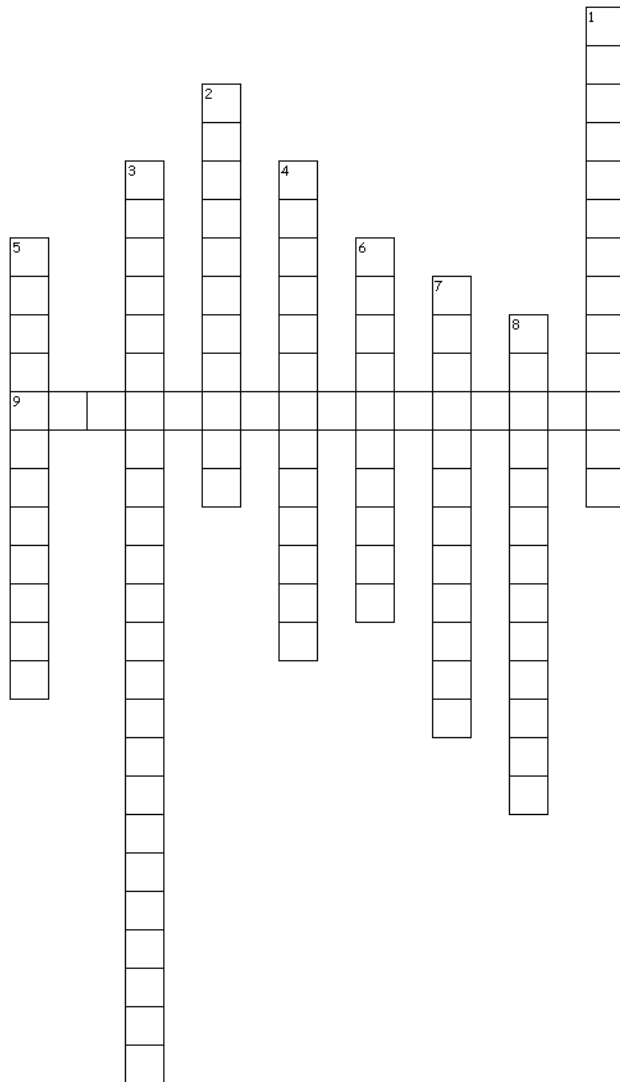
Loan Officers facilitate lending by finding potential clients and assisting them in applying for loans.

Bank Tellers receive and pay out money. They cash checks, accept deposits and loan payments, process withdrawals, and handle foreign currency exchanges.

New Accounts Clerks interview persons desiring to open accounts in financial institutions. They explain the account services available to prospective customers and assist them in preparing applications.

Handout #2

Finance Careers: Criss Cross
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Directions: Use the clues below to complete the Criss Cross. There are no spaces between words.

Across

9. This person helps people open bank accounts.

Down

1. This person investigates the history and credit standing of individuals or businesses.

2. This person assists people who are applying for loans.

3. This person assesses the financial needs of individuals.

4. This person provides guidance to prospective loan applicants.

5. This person does accounting for the U.S. Internal Revenue Service.

6. This person cashes checks and accepts deposits.

7. This person decides how to collect owed taxes.

8. This person determines the degree of risk in extending credit or lending money.

Word Bank

Bank Teller	Tax Collector	Revenue Agent	Personal Financial Advisor
Credit Analyst	Loan Counselor	Credit Checker	New Accounts Clerk
Loan Officer			

Answer Sheet

Finance Careers: Word Search 3rd Grade Career Development: Activity #6

