

**5<sup>th</sup> 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:**

- 5<sup>th</sup> Grade Career Development Activity #6– **Finance Careers: Careers in Finance** handout #1
- 5<sup>th</sup> Grade Career Development Activity #6– **Finance Careers: Do I Want to Work in Finance?** handout #2
- 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 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. “I know that some of these careers may be difficult to understand, but you’ll see that you can do them and you might like to one day!” *Distribute **Finance Careers: Do I Want to Work in Finance?** handout #2. 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 student responses. In groups, have the students discuss their likes and dislikes of finance careers.*

**Evaluation:**

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

## Handout #1

### Finance Careers: Careers in Finance 5<sup>th</sup> 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.

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

**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.

**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** cash checks, accept deposits and loan payments, process withdrawals, sell travelers' checks and handle foreign currency exchanges.

**Credit Counselors** work with individuals or organizations to devise strategies to manage debt.

**Claims Adjusters** review settled claims to determine that payments and settlements are made in accordance with company practices and procedures.

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

Handout #2

Finance Careers: Do I Want to Work in Finance?  
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Directions: All the characteristics listed below apply to occupations in the finance career cluster. Check the box next to each item that applies to you to see if you might like to be work in a finance occupation one day.

**When I grow up, I could...**

	YES	MAYBE	NO
Help others understand their finances			
Work with math			
Advise people and businesses			
Be accurate and pay attention to details			
Work with other people			
Work by myself			
Solve problems			
Make graphs and charts			
Conduct in-depth investigations of finances			