



San Joaquin County Office of Education

Career and Technical Education
Banking Occupations ~ Course Outline
 CBEDS#: 4103

Banking Occupations *Course Outline*

		Classroom	CC
1	Introduction	10	4
	<ul style="list-style-type: none"> • Course Overview • Grading, Evaluation, Attendance • Career Opportunities • Identify entry-level positions • The Role of Money and The Federal Reserve • Types of Financial Institutions • Bank Services • Corporate Structure • Marketing • Terminology 		
2	Basic Skills	60	
	<ul style="list-style-type: none"> • Math: decimals, fractions, and percents • Computer Operation/Word Processing • Calculator: 10-key touch • Calculator: Advanced business operations • Telephone Etiquette • Filing/Organizational skill 		
3	Checking Accounts	60	10
	<ul style="list-style-type: none"> • Opening an account • Writing Checks <ul style="list-style-type: none"> ➤ Identify parts of a check, by name ➤ Endorsements • Balance Bank Statement <ul style="list-style-type: none"> ➤ Outstanding Checks ➤ Service Charges • “Clearing” of Checks 		
4	Savings Accounts	40	4
	<ul style="list-style-type: none"> • Savings plans • Investments • Simple and Compound Interest • Terms, Penalties, Fees 		



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5	Loans	20	4
	<ul style="list-style-type: none"> • Establishing Credit • Credit Cards • Personal/Business Loans • Credit Reporting • Finance charges, APR 		
6	Customer Service Representative		
	<ul style="list-style-type: none"> • Currency and Coin <ul style="list-style-type: none"> ➤ Origins and Characteristics of U. S. Currency ➤ Count, package, strap currency ➤ Identify Counterfeit Money ➤ Roll coin • Processing Checks <ul style="list-style-type: none"> ➤ Legal Requirements of Check Writing ➤ Cashing Checks ➤ Accepting Deposits and Payments • Customer identification <ul style="list-style-type: none"> ➤ Stop payments/holds/uncollected funds ➤ Signature verification ➤ Check filing • Cash Drawer <ul style="list-style-type: none"> ➤ Recording Cash-in and Cash-outs ➤ Balancing • Debits and Credits • Large currency transactions – Federal Regulations • Cross-selling techniques 		
7	Customer Service	30	25
	<ul style="list-style-type: none"> • The importance of Customer Service Representatives • Telephone skills • Handling Difficult Customers 		
8	Loss Prevention/Security	20	8
	<ul style="list-style-type: none"> • Robbery prevention/procedures • Confidentiality • Fraud Prevention • Bait Money and Cash control • Identity Fraud 		



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9	Budgeting/Financial Management	65	
	<ul style="list-style-type: none"> • Preparing budgets • Statement of Net Worth 		
10	Investments	50	
	<ul style="list-style-type: none"> • Planning for Life and Retirement • Projecting the future • Mutual Funds • Insurance • Real Estate 		
11	The Stock Market	80	
	<ul style="list-style-type: none"> • Understanding the stock market • Reading the stock quotes • Researching companies • Tracking stocks • The Wall Street Journal 		
12	Financial Planning with Quicken	80	
	<ul style="list-style-type: none"> • Goals and Concepts • Setting up your finances • Analyzing and Budgeting • Budgeting • Credit Transactions • Income Tax • Investments/Mutual Funds • Risk and Insurance • Retirement 		
13	Using the Internet	30	
	<ul style="list-style-type: none"> • Financial Information • Financial Investment • Banking • Job Search 		



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14	Job Readiness Skills	30	
	<ul style="list-style-type: none"> • Resume • Cover Letter/Follow-up Letter • Job Application • Interviewing Skills • Pre-Employment Resting • Proper Business Attire Guidelines 		
	Classroom	635	
	CC		85
	Total Hours	720	