

# ACCOUNTING AND FINANCIAL PLANNING

## PROGRAM DESCRIPTION:

The Financial Planning certificate provides students with basic accounting skills combined with training in financial planning. Students completing this certificate can assist individuals and companies within the areas of budgeting, taxes, and financial planning. This certificate also serves as an excellent foundation for students wishing to take the National Association of Securities Dealers series 6 and 7 examinations.

## CAREER AT A GLANCE:

### HOW DO I KNOW IF THIS MAJOR IS FOR ME?

- You enjoy meeting new people
- You enjoy inspecting financial records
- You like to record and summarize financial data
- You manage your own financial records
- You like to learn about economics, financial markets, and banking
- You are comfortable working with numbers and routine calculating
- You enjoy sharing and teaching information to others
- You like working with data and details

*Use Focus2Career on your MyChaffey portal to learn more about careers and majors that fit you best.*

### WHERE CAN I WORK?

Collection Agencies  
 Banks or Credit Unions  
 Financial Companies  
 Government Agencies  
 Insurance Companies  
 Investment Firms  
 Credit Repair Service  
 Credit Reporting Agencies

*For more information visit: [www.labormarketinfo.edd.ca.gov/OccGuides](http://www.labormarketinfo.edd.ca.gov/OccGuides)*

### HOW DO I GET STARTED?

- Start taking the required accounting courses
- Apply for entry level positions in reception, data entry, or customer service with employers where you would like to promote
- Job shadow and network with accounting professionals
- Practice networking and interpersonal communication skills

### WHAT CAN I DO WITH THIS CERTIFICATE?

<i>Position Title</i>	<i>CA Median Salary</i>
Bill and Account Collection	\$39,950
Brokerage Clerk	\$55,550
Credit Checker	\$39,410
Credit Authorizer	\$39,410
Loan Interviewer	\$44,380
New Account Clerk	\$38,660
Financial Sales Agent	\$50,740
Bank Teller	\$29,560
Personal Banking Representative	\$38,660

### WHAT CAN I DO WITH HIGHER EDUCATION AND ADDITIONAL TRAINING?

<i>Position Title</i>	<i>CA Median Salary</i>
Personal Financial Advisor	\$103,490
Financial Consultant	\$103,490
Loan Counselor	\$49,550
Investment Advisor	\$103,490
Financial Manager	\$135,460
Credit Analyst	\$77,540
Portfolio Manager	\$103,490
Loan Officer	\$66,190
Insurance Broker	\$49,550

*For more information about careers, education and training requirements, salary data, and job outlooks visit [www.onetonline.org](http://www.onetonline.org).*

## ACCOUNTING AND FINANCIAL PLANNING

**MAJOR AND COURSE REQUIREMENTS:**

**LEGEND:** G=Grade    IP=In Progress    N=Need    **Bold: Prerequisites**    Plain Text: No Prerequisites

<i>Requirements for the Financial Planning Certificate: (B101)</i>		<b>Grade</b>	<b>IP</b>	<b>Need</b>	<b>Units</b>
ACCTGFS 30	Personal Finance				3
ACCTGFS 442	Fundamentals of Finance and Investing				3
ACCTGFS 453	U.S. and California Income Tax Preparation				4
ACCTGFS 465	Financial Accounting for the Non-Accounting Major (or ACCTG 1A, Financial Accounting, 4)				3

Student Name: \_\_\_\_\_

ID#: \_\_\_\_\_

Date: \_\_\_\_\_

Counselor: \_\_\_\_\_

<i>Plus three units from the following:</i>		<b>Grade</b>	<b>IP</b>	<b>Need</b>	<b>Units</b>
ACCTG 460	Commercial Accounting Software				3
BUS 60	Business Ethics				3

COUNSELOR NOTES:

\$46 per unit for CA Residents

All courses required for a certificate must be completed with a minimum grade of C.