



# FINANCE Career Pathway

## The Great Northwest

### 2022-2023



**EXPLORE:** Click on the links to find the job titles that seem most interesting to you to learn more! Save any jobs you are interested in from this career pathway in your XELLO account so that you can create an Academic and Career Plan (ACP) later on. Salary ranges are an estimate and reflect from no experience through 30+ years experience.

| <b>Educational Level</b><br>May also require work experience | <b>Accounting &amp; Business Finance</b>   | <b>Securities/Investments &amp; Banking Services</b>  | <b>Insurance</b>  |
|--|--|---|---|
| High School Diploma, Certification                           | <a href="#">Tax Preparer</a><br><a href="#">Statement Representative</a><br><a href="#">Accounts Payable/Receivable Associate</a><br><a href="#">Bookkeeper</a> ○<br><a href="#">Bill and Account Collector</a> ○<br>Range \$18,320-68,060 | <a href="#">Bank Teller</a> * ○<br><a href="#">New Accounts Representative</a> *<br><a href="#">Loan Processor</a> *<br>Range \$31,200-34,880   | <a href="#">Insurance Claim Representative</a><br>Range \$26,720-40,130   |
| Certification or Technical Diploma                           | <a href="#">Inventory Control Associate</a><br><a href="#">Payroll Associate</a><br>Range \$31,200-48,000  | <a href="#">Loan Counselor</a><br><a href="#">Financial Planning Assistant</a><br><a href="#">Personal Banker</a><br>Range \$31,200-103,650   | <a href="#">Customer Service/Account Management</a> *<br><a href="#">Claims Assistant/Adjuster</a><br><a href="#">Underwriting Assistant</a><br><a href="#">Insurance Sales</a><br>Range \$31,200-133,420 |
| Registered Apprenticeship                                    | <a href="#">Financial Services Professional</a><br>Range \$34,525-103,650  |   |   |
| Associate Degree   | <a href="#">Accounting Specialist</a><br><a href="#">Budget Analyst</a><br><a href="#">Contract Specialist</a><br><a href="#">Financial Analyst</a> *<br>Range \$36,150-101,320  | <a href="#">Loan Officer</a> ○<br><a href="#">Financing Specialist</a><br>Range \$27,420-104,220  | <a href="#">Real Estate Assessor</a><br><a href="#">Financial Service Representative</a><br><a href="#">Insurance Agent</a> ○<br><a href="#">Insurance Underwriter</a> ○<br>Range \$20,990-138,900        |
| Bachelor Degree and beyond                                   | <a href="#">Accountant</a> * ○<br><a href="#">Auditor</a> ○<br><a href="#">Financial Manager</a> * ○<br><a href="#">Fraud Analyst</a> ○<br>Range \$40,910-164,110  | <a href="#">Bank Manager</a> * ○<br><a href="#">Investment Specialist</a> ○<br><a href="#">Mortgage Broker</a> ○<br><a href="#">Research Analyst (Financial)</a> ○<br><a href="#">Money Manager</a> ○<br>Range \$40,910-219,070 | <a href="#">Personal Financial Advisor</a><br><a href="#">Risk Management Specialist</a><br><a href="#">Insurance Claims Adjusters</a> ○<br>Range \$40,910-156,910  |
| Postsecondary Options  | Click <a href="#">HERE</a> for Accounting & Finance Postsecondary Options  | Click <a href="#">HERE</a> for Investment & Banking Postsecondary Options   | Click <a href="#">HERE</a> for Insurance Postsecondary Options  |

\* **BRIGHT OUTLOOK** = these jobs are expected to grow in the future – which means more opportunities for you!

○ **XELLO** = you can learn more and save this job in your Xello account (note: some job titles might look a little different in Xello)



# FINANCE Career Pathway At Gilmanton High School



A career pathway in high school must include:

- A sequence of courses (including at least 2 CTE courses)
- Two of the following components: *Career and Technical Student Organization, Work-based Learning, Industry Recognized Credential, College Credit Opportunity*

|  |  |  |   |
|--|--|--|---|
| <b>Career and Technical Education Courses</b>  | Must include a sequence of at least TWO Career and Technical Education courses. Should align with Education Building Blocks for the pathway: <ul style="list-style-type: none"> <li>• Introduction to Business</li> <li>• Personal Finance (transcripted with CVTC)</li> <li>• Introduction to Accounting</li> <li>• Microsoft Office (transcripted with CVTC)</li> <li>• Business Math</li> </ul>   |  | <b>CAREER EXPLORATION PROGRAMS</b><br><br><b>Statewide:</b><br>You can find the <a href="#">list of career exploration programs</a> associated with this pathway and develop a program list specific to your region or school.<br><b>Regional or Local:</b> <ul style="list-style-type: none"> <li>• <a href="#">CESA 10 – CCR Business &amp; Industry Tours</a></li> <li>• <a href="#">CESA 10 – CCR Career Pathway Business Panels</a></li> <li>• <a href="#">CESA 10 – CCR Job Shadows</a></li> <li>• <a href="#">CESA 10 – CCR Mock Interviews</a></li> </ul> |
| <b>Additional Employer Recommended Courses</b>   | Should align with Education Building Blocks for this pathway: <ul style="list-style-type: none"> <li>• Pre-Calculus</li> </ul>   |  |   |
| <b>Career and Technical Student Organization</b>   | <ul style="list-style-type: none"> <li>• <a href="#">Wisconsin Future Business Leaders of America (FBLA) Student Organization</a></li> </ul>   |  |   |
| <b>Work-Based Learning Program Options</b>   | <ul style="list-style-type: none"> <li>• Youth Apprenticeship- <a href="#">Finance</a> (450 hours/year; 1-2 years)</li> </ul>  |  |   |
|  | <b>Accounting &amp; Business Finance</b>   | <b>Securities/Investments &amp; Banking Services</b> | <b>Insurance</b>  |
| <b>Industry Recognized Credential Options</b><br>Learn the skills that employers want to see!<br><i>Italics = must be 18 years old to obtain</i>                           | <p style="text-align: center;"> <a href="#">IC3</a> (Internet Core Competency Certification)*<br/>           Microsoft Office Specialist (MOS)* &amp; Microsoft Technology Associate (MTA)* <a href="#">Microsoft</a> or <a href="#">Certiport</a><br/> <a href="#">A*S*K</a> - ANY Business or Marketing Certificate<br/>           Entrepreneurship and Small Business Certification (<a href="#">Certiport</a>)         </p>  |  |   |
|  | N/A  | N/A  | N/A   |
| <b>College Credit Opportunities</b><br>You can find the list of college credit opportunities included in the postsecondary options for this pathway <a href="#">HERE</a> . | <p><b>Please see your school counselor for information on the following options:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Start College Now</a> through the <a href="#">Wisconsin Technical College System</a></li> <li>• <a href="#">UW System Early College Credit Program</a></li> </ul> <p><b>College Courses Offered at Your High School:</b><br/> <u>Transcripted Credit Courses:</u></p> <ul style="list-style-type: none"> <li>• Intro To Accounting (CVTC)</li> </ul> |  |   |