

5.0 MARKETING

5.7 Financial Services (S) Students will understand the nature, functions and marketing concepts associated with financial services institutions in a dynamic marketplace. They will demonstrate competency by performing a variety of marketing and financial transactions.

Link to Content Standards for California Public Schools

Benchmarks	English Standards	Math Standards	Science Standards	Social Science/ History Standards
5.7.1 Advertising and Promotion—design a promotional plan for a financial institution	(9-10)R2.3-2.5; (9-10)W2.3; (9-10)W2.4; (9-10)LS1.3-1.9; (9-10)LS2.5-2.6; (11-12)W1.6-1.8; (11-12)W2.6; (11-12)LS1.1, 1.3; (11-12)LS2.4	(6)SDP1.1; (6)SDP2.5; (7)NS1.3; (7)NS1.6-1.7; (7)NS2.2; (7)AF1.1, 1.2, 1.5; (7)MR1.1, 1.2; (7)MR2.1, 2.3, 2.4, 3.1, 3.3	(9-12)I&E1 a	
5.7.2 Credit Review—explain credit review procedures utilized in the various financial services industries	(8)R2.1; (9-10)R2.3-2.5; (9-10)W1.3-1.6; (9-10)W1.7-1.8; (9-10)LS1.3-1.9; (9-10)LS2.2; (11-12)W1.3-1.9	(7)MR1.1; (7)MR3.1, 3.3; AI-5.0; AI-10.0; AI-13.0; AI-15.0		

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Benchmarks	English Standards	Math Standards	Science Standards	Social Science/ History Standards
5.7.3 Customer Relations—describe customer relations techniques used to satisfy customer needs and wants; describe the importance of conflict resolution	(9-10)R2.3-2.5; (9-10)W1.3-1.6; (9-10)W1.7-1.8; (9-10)W2.3-2.4; (9-10)LS1.3-1.9; (9-10)LS2.5; (9-10)LS2.6; (11-12)W1.6-1.8; (11-12)W2.6; (11-12)LS1.1-1.3; (11-12)LS2.4	(7)MR1.1; (7)MR3.1, 3.3	(9-12)I&E1 d	
5.7.4 Electronic Marketing—explain how electronic marketing (E-trade, home banking, etc) changes the dynamics of institutions selling products and services	(9-10)R2.3-2.5; (9-10)W1.3-1.6; (9-10)W1.7-1.8; (9-10)LS1.3-1.9; (9-10)LS2.2; (11-12)W1.3-1.9	(6)SDP2.5; (7)NS1.3; (7)NS1.6-1.7; (7)NS2.2; (7)MR1.1, 1.2; (7)MR2.1, 2.3, 2.4, 3.1, 3.3	(9-12)I&E1 a	
5.7.5 Financial Institutions—compare and contrast types of financial service institutions	(9-10)LS1.1-1.2; (11-12)LS1.1			
5.7.6 Industry Ethics—discuss the importance of confidentiality in consumer and employee transactions; identify ethical considerations relating to conducting business with government and regulatory agencies	(9-10)R2.8; (9-10)W2.3e; (9-10)W2.4; (9-10)LS2.5; (11-12)R2.6; (11-12)R3.5c; (11-12)R3.7c; (11-12)W1.3	(7)MR3.1, 3.3	(9-12)I&E1 m	

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Benchmarks	English Standards	Math Standards	Science Standards	Social Science/ History Standards
5.7.7 Marketing Concepts—discuss effective selling and cross-selling skills; utilize those skills to identify appropriate products and services options specific to the consumer	(9-10)R2.3-2.5; (9-10)W1.3-1.6; (9-10)W1.7-1.8; (9-10)W2.3; (9-10)LS1.3-1.9; (9-10)LS2.6; (11-12)W1.6-1.8	(7)MR1.1; (7)MR3.1, 3.3	(9-12)I&E1d	(12)ECON12.2
5.7.8 Policies and Procedures—demonstrate knowledge of the policies and procedures required for conducting and documenting financial transactions according to specific industry regulations	(8)R2.1; (9-10)R2.1, 2.3-2.6; (9-10)W1.3-1.6; (9-10)W1.7-1.8; (9-10)W2.3; (9-10)W2.6; (9-10)LS1.3-1.9; (9-10)LS2.6; (11-12)W1.6-1.8	(7)NS1.3; (7)NS1.6-1.7; (7)NS2.2; (7)AF1.1; (7)MR1.1, 1.2; (7)MR2.1, 2.4, 3.1, 3.3; AI-10.0; AI-13.0; AI-15.0		
5.7.9 Products and Services—explain financial products and services available to the consumer in the banking, insurance, investment and brokerage industries	(8)R2.1; (9-10)R2.1, 2.3-2.5; (9-10)W1.3-1.6; (9-10)W1.7-1.8; (9-10)W2.3; (9-10)LS1.3-1.9; (9-10)LS2.6; (11-12)W1.6-1.8; (11-12)W2.6	(7)NS1.3; (7)NS1.6-1.7; (7)NS2.2; (7)AF1.1; (7)MR1.1, 1.2; (7)MR2.1, 2.4, 3.1, 3.3		(12)ECON12.2.9

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Benchmarks	English Standards	Math Standards	Science Standards	Social Science/ History Standards
5.7.10 Regulation—analyze government and industry regulations in the financial services industry and how they relate to consumer transactions	(8)R2.1; (9-10)R2.1, 2.3-2.5; (9-10)W1.3-1.6; (9-10)W1.7-1.8; (9-10)LS1.1, 1.3-1.9; (9-10)LS2.6; (11-12)R2.3; (11-12)W1.6-1.8	(7)NS1.3; (7)NS1.6-1.7; (7)NS2.2; (7)AF1.1; (7)MR1.1, 1.2; (7)MR2.1, 2.4, 3.1, 3.3		(11)USH11.6.1; (12)ECON12.6.2
5.7.11 Risk Management—describe security procedures, loss prevention, and safety issues facing financial services institutions; discuss the risks associated with monetary loss or failure	(8)R2.1; (9-10)R2.1, 2.3-2.5; (9-10)W1.3-1.6; (9-10)W1.7-1.8; (9-10)LS1.1, 1.3-1.9; (9-10)LS2.6; (11-12)R2.3; (11-12)W1.6-1.8	(6)SDP2.5; (6)SDP3.5; (7)NS1.3; (7)NS1.6-1.7; (7)NS2.2; (7)AF1.1, 1.2, 1.5; (7)MG1.3; (7)SDP1.1-1.3; (7)MR1.1, 1.2; (7)MR2.1, 2.3, 2.4, 3.1, 3.3; AI-10.0; AI-13.0; AI-15.0		(11)USH11.6.1; (11)USH11.6.2; (12)ECON12.5.3; (12)ECON12.6.3, 4

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