Financial Planning, services for financial and investment planning, banking, insurance, and business financial management.

### Sample Career Specialties/Occupations
- Personal Financial Advisor
- Tax Preparation Specialists
- Sales Agents, Securities, Commodities
- Investment Advisors
- Brokerage Representatives
- Development Officers
- Securities/Investments Analysts
- Stock Brokers
- Accountants
- Financial Analysts
- Treasurers, Controllers and Chief Revenue Agents
- Auditors
- Economists
- Tax Auditors
- Collectors
- Revenue Agents
- Benefits Specialists
- Real Estate Analysts
- Certified Purchasing Professionals
- Client Managers
- Credit Analyst
- Loan Officers
- Account Representatives
- Tellers
- Loan Processors
- Customer Service Reps
- Data Processors
- Internal Auditors
- Compliance Officers
- Title Researchers & Examiners
- Abstractors
- Credit Report Providers
- Repossession Agents
- Network Service Representatives
- Operations Managers
- Debt Counselors
- Claims Representatives, Examiners, and Investigators
- Insurance Appraisers
- Underwriters
- Actuaries
- Sales Agents
- Customer Service Agents
- Processing Clerks
- Direct Marketing Representatives
- Insurance Brokers
- Loss Prevention Specialists

### Pathways
- **Securities & Investments**
- **Business Finance**
- **Banking Services**
- **Insurance**

### Cluster knowledge and skills
- Academic Foundations
- Communications
- Problem Solving and Critical Thinking
- Information Technology
- Systems
- Safety, Health and Environment
- Leadership and Teamwork
- Ethics and Legal Responsibilities
- Employability and Career Development
- Technical Skills