



CAREER CLUSTER
Finance

CAREER PATHWAY
Corporate Finance

INSTRUCTIONAL AREA
Professional Development

BUSINESS FINANCE SERIES EVENT

PARTICIPANT INSTRUCTIONS

- The event will be presented to you through your reading of the 21st Century Skills, Performance Indicators and Event Situation. You will have up to 10 minutes to review this information and prepare your presentation. You may make notes to use during your presentation.
- You will have up to 10 minutes to make your presentation to the judge (you may have more than one judge).
- You will be evaluated on how well you demonstrate the 21st Century Skills and meet the performance indicators of this event.
- Turn in all of your notes and event materials when you have completed the event.

21st CENTURY SKILLS

- Critical Thinking – Reason effectively and use systems thinking.
- Problem Solving – Make judgments and decisions and solve problems.
- Communication – Communicate clearly.
- Creativity and Innovation – Show evidence of creativity.

PERFORMANCE INDICATORS

- Discuss employment opportunities in the finance industry.
- Explain professional designations in the field of business finance.
- Explain the roles and responsibilities of financial management personnel.
- Discuss the financial planning process.
- Explain the need for ongoing education as a worker.

EVENT SITUATION

You are to assume the role of a financial planner with AREA FINANCIAL SERVICES. Your manager (judge) wants you to prepare a presentation about a career in business finance for a high school finance class.

A finance teacher at the local high school asked for a representative from AREA FINANCIAL SERVICES to speak to the class about careers in finance. The presentation should include a description of the following certifications to include areas of focus, education, exams needed, work experience and any membership requirements.

- Chartered Financial Analyst (CFA)
- Certified Treasury Professional (CTP)
- Certified Financial Planner (CFP)

The presentation should also highlight why a professional designation may be recommended and important steps in the financial planning process.

You will give the presentation to your manager (judge) in a role-play to take place in the manager's (judge's) office. The manager (judge) will begin the role-play by greeting you and asking to hear your presentation. After you have presented the information and have answered the manager's (judge's) questions, the manager (judge) will conclude the role-play by thanking you for your work.

JUDGE INSTRUCTIONS

DIRECTIONS, PROCEDURES AND JUDGE ROLE

In preparation for this event, you should review the following information with your event manager and other judges:

1. Participant Instructions, 21st Century Skills and Performance Indicators
2. Event Situation
3. Judge Role-Play Characterization
Allow the participants to present their ideas without interruption, unless you are asked to respond. Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
4. Judge Evaluation Instructions and Judge Evaluation Form
Please use a critical and consistent eye in rating each participant.

JUDGE ROLE-PLAY CHARACTERIZATION

You are to assume the role of a manager with AREA FINANCIAL SERVICES. You have asked a financial planner (judge) to prepare a presentation about careers in business finance for a high school finance class.

A finance teacher at the local high school asked for a representative from AREA FINANCIAL SERVICES to speak to the class about careers in finance. The presentation should include a description of the following certifications to include areas of focus, education, exams needed, work experience and any membership requirements.

- Chartered Financial Analyst (CFA)
- Certified Treasury Professional (CTP)
- Certified Financial Planner (CFP)

The presentation should also highlight why a professional designation may be recommended and important steps in the financial planning process.

The participant will give the presentation to you in a role-play to take place in your office. You will begin the role-play by greeting the participant and asking to hear the presentation.

During the course of the role-play, you are to ask the following questions of each participant:

1. What aspects of a career in finance will be the most attractive to high school students?
2. What advice can you give them for college that will help them with a future career in accounting?

Once the financial planner (participant) has presented the information and has answered your questions, you will conclude the role-play by thanking the financial planner (participant) for the work.

You are not to make any comments after the event is over except to thank the participant.

SOLUTION

Description of each certification:

- Chartered Financial Analyst (CFA) – a CFA is a professional focused on investment management and financial analysis. Most CFAs are financial advisors, portfolio managers or other investment professionals.
- Certified Treasury Professional (CTP) – a CTP is a professional focused on risk management, working capital, liquidity management and treasury. Most professionals are corporate treasurers, treasury managers, cash managers, and finance professionals.
- Certified Financial Planner (CFP) – a CFP provides comprehensive financial analysis and advice to their clients. Their focus includes estate, trust, and gift tax planning in addition to overall financial advice. Professionals tend to be financial analysts, financial advisors, or wealth managers.

Competitors need not prepare a chart to present the comparison.

	CFA	CTP	CFP
Focus	Investment management and financial analysis	Treasury management	Comprehensive financial planning
Education	None specifically	Undergraduate degree in finance, accounting or business	CFP Board registered program
Exam	3 levels of exams	CTP exam	CFP exam
Work Experience	4 years	2-years if do not have an undergraduate degree	3-years of financial planning
Membership	CFA Institute	None required	None required

The financial planning process:

1. Establish a relationship with the client.
2. Collect financial information and identify client's goals.
3. Assess the client's current financial situation and identify any potential issues.
4. Create a financial plan and present it to the client.
5. Implement the plan by executing the recommended (and agreed upon) actions.
6. Regularly review and update the plan as needed.

Reasons why a designation may be recommended for finance professionals (*this is only a partial list*):

1. Credibility and trust – the professional designations indicate the professional has met a rigorous standard of education and/or passed a comprehensive exam. In addition, most certifications require high ethical conduct by the certificate holder.
2. Knowledge and expertise – generally professional designations require an in-depth understanding of complex topics. Many designations required continuous education to maintain the certification so that professionals remain current with industry standards.
3. Career advancement – many employers prefer candidates with professional certifications or earning a professional designation may lead to promotion.
4. Competitive advantage – professionals with a certification may be more likely to get hired or attract clients over a professional without such designations or certifications.

EVALUATION INSTRUCTIONS

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event director and the other judges to ensure complete and common understanding for judging consistency.

Level of Evaluation	Interpretation Level
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 th percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 th percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 th percentile of business personnel performing this performance indicator.



BUSINESS FINANCE SERIES 2025

JUDGE'S EVALUATION FORM DISTRICT EVENT 1

Participant: _____

ID Number: _____

INSTRUCTIONAL AREA: Professional Development

Did the participant:		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
PERFORMANCE INDICATORS						
1.	Discuss employment opportunities in the finance industry?	0-1-2-3-4	5-6-7-8	9-10-11	12-13-14	
2.	Explain professional designations in the field of business finance?	0-1-2-3-4	5-6-7-8	9-10-11	12-13-14	
3.	Explain the roles and responsibilities of financial management personnel?	0-1-2-3-4	5-6-7-8	9-10-11	12-13-14	
4.	Discuss the financial planning process?	0-1-2-3-4	5-6-7-8	9-10-11	12-13-14	
5.	Explain the need for ongoing education as a worker?	0-1-2-3-4	5-6-7-8	9-10-11	12-13-14	
21st CENTURY SKILLS						
6.	Reason effectively and use systems thinking?	0-1	2-3	4	5-6	
7.	Make judgments and decisions, and solve problems?	0-1	2-3	4	5-6	
8.	Communicate clearly?	0-1	2-3	4	5-6	
9.	Show evidence of creativity?	0-1	2-3	4	5-6	
10.	Overall impression and responses to the judge's questions	0-1	2-3	4	5-6	
TOTAL SCORE						