

Wealth Management

Mrs. Castorena



By MBAResearch





Course Description

Wealth Management is an accelerated financial literacy course in which High School of Business™ students actively learn to manage and build personal wealth. Students develop an understanding of the relationship between economics and wealth management, set personal and financial goals, establish a personal budget, manage personal finances, explore methods of generating income, determine insurance needs, and acquire investing skills and knowledge. To demonstrate their mastery of such financial literacy skills and knowledge, students engage in an intensive project to educate those around them (i.e., fellow high school students, adult member of the community, etc.) about wealth management, its importance, and its impact upon a person's overall success in life.

These skills relate to real world careers. Students will have opportunities to compete and participate in Skills USA and Future Business Leaders of

America activities throughout the year.

Course Objectives

- Acquire knowledge of economic concepts to understand their impact on wealth management.
- Understand the fundamental principles of money needed to make financial exchanges.

- Analyze financial needs and goals to determine financial requirements.
- Explore methods of generating income to achieve financial goals.
- Manage personal finances to achieve financial goals.
- Understand the use of financial-services providers to aid in financial-goal achievement.
- Use investment strategies to ensure financial well-being.
- Utilize sources of securities information to make informed financial decisions.
- Identify potential threats and opportunities to protect financial well-being.
- Acquire self-development skills to enhance relationships and improve efficiency in the work environment.
- Utilize critical-thinking skills to determine best options/outcomes.

Complete on-boarding (new hire) activities to fulfill government and employer requirements.

Computers

Each students will have to use a computer and Microsoft Office for most assignments. All class materials are found in Teams and MBA Research Canvas online. If they do not have a computer please contact Mrs.Castorena.

Grade Break Down

- Classwork/Homework/LAPS: 15%
- Professional Development: 15%
- Projects: 40%
- Tests/Quizzes: 10%
- Final Exam: 20%

Professional Development

- Presentations
- Professional Dress Day—Students will have an option to dress in formal business attire once a month on a designated day.
- Responsible and Appropriate Computer Use
- Cellphone Policy - Cell phone use is not allowed during class time except under the discretion of the instructor at such time will be given permission to use to work on projects and assignments.

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Contact Information

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