

FBLA: Securities & Investments - Topic List

Topic: Investment Fundamentals	
Task	
1. Terminology	
2. Savings	
3. Stages of investing and relationship between risk and return	
4. Sources of financial information to make investment decisions	
Topic: Investment Wrappers, Taxation, and Trusts	
Task	
1. Individual savings accounts	
2. Pensions	
3. Tax	
4. Investment bonds	
Topic: Investment Product & Funds	
Task	
1. Loans	
2. Mortgages	
3. Life assurance	
4. Unit trusts	
5. Opened ended investment companies	
6. Pricing, dealing, and settlement	
7. Investment trusts	
8. Hedge funds	
Topic: Stock Market	
Task	
1. Explain how stock market benefits investors and companies	
2. Read stock tables for investment related information	
3. Options for handling accumulated money/earnings	
4. Types of investments	
5. Primary vs secondary markets	
6. Bull, bear, and pig markets	
Topic: Stock versus Other Investments	
Task	
1. Compounding	
2. Purpose of company	
3. Describe ethical behavior in support center.	
4. Gathering relevant information	

5. Financial statements
6. Terminology
Topic: Mutual Funds
Task
1. Understanding total return
2. Mutual funds and taxes
3. Purchasing mutual funds
4. Investment in mutual funds
5. Fund costs
Topic: Basics of Bonds
Task
1. Bond duration
2. Buying bonds
3. Process of issuing bonds
4. Roles of collateral
5. Secured and unsecured bonds
6. Introduction to government bonds
7. U.S. government agency bonds and savings bonds
Topic: Derivatives
Task
1. Futures
2. Options
3. SWAPS
4. Derivative uses
Topic: Financial Services Regulation
Task
1. Financial Services & Markets Act
2. Financial Crime
3. Insider dealing and market abuse
4. Data Protection Act 1998
5. Breaches, complaints, and compensation

References:

Career Cluster Resources for Marketing, Sales & Service. 2008. National Association of State Directors of Career Technical Education Consortium. Washington, DC

Career Cluster Resources for Business, Management and Administration. 2008
National Association of State Directors of Career Technical Education Consortium. Washington, DC

Customer Service Representative Competencies, 2011. HDI-SCA Certification Standard & Self-Study Guide. Colorado Springs, CO.