



FINANCE CLUSTER

cheat sheet

EVENTS: ACT, BFS, FTDM

CORE SKILLS THE JUDGES WILL BE LOOKING FOR:

1. UNDERSTANDING OF FINANCIAL STATEMENTS
2. UNDERSTANDING OF FINANCIAL NEEDS FOR CLIENT
3. DECISION MAKING REGARDING FINANCIAL STRATEGIES
4. CLEAR COMMUNICATION
5. RISK ASSESSMENT
6. ETHICAL ASSESSMENT
7. CLIENT FOCUSED MINDSET

QUICK TIPS FOR ROLE-PLAY & PRESENTATIONS

- OPENING WITH POSITION, NAME AND REASON WHY YOU ARE THERE
- FINANCIAL CONTEXT
- USE DATA & NUMBERS
- USE REASONING TO TIE DATA BACK TO CLIENT'S SITUATION
- KEEP IT SIMPLE
- SUMMARIZE AND CLOSE

PRO TIP:
TIE FINANCIAL DATA
BACK TO CUSTOMER'S
GOALS. EXPLAIN
REASONING BEHIND
NUMBERS.

TOP PERFORMANCE

INDICATORS:

- DISCUSS THE NATURE & SCOPE OF COMPLIANCE IN THE FINANCE INDUSTRY
- EXPLAIN THE RESPONSIBILITIES OF FINANCE PROFESSIONALS IN PROVIDING CLIENT SERVICES
- EXPLAIN THE NEED TO SAVE AND INVEST
- DESCRIBE THE ROLE OF FINANCIAL INSTITUTIONS
- EXPLAIN THE TYPES OF FINANCIAL MARKETS
- DESCRIBE THE RELATIONSHIP BETWEEN ECONOMIC CONDITIONS AND FINANCIAL MARKETS
- EXPLAIN THE NATURE & SCOPE OF THE FINANCIAL INFORMATION MANAGEMENT FUNCTION

WORDS TO IMPRESS JUDGES:

- LIQUIDITY - ABILITY TO MEET SHORT-TERM OBLIGATIONS
- LEVERAGE - USING DEBT TO ENHANCE RETURNS
- DIVERSIFICATION - SPREADING RISK ACROSS INVESTMENTS
- ROI (RETURN ON INVESTMENT) - PROFIT RELATIVE TO COST
- EQUITY - OWNERSHIP INTEREST IN A COMPANY
- VALUATION - PROCESS OF DETERMINING COMPANY WORTH