

# FINANCIAL SERVICES CAREER PATHS – Larry L. Luing School of Business

**Banking** - There are a multitude of occupations in banking, from front-line customer service in branch offices to loan production, regulatory compliance, and back office support. Careers in the banking industry also include accountants and auditors; branch managers; bank examiners, billing, bookkeeping, and accounting clerks; commodities brokers; compliance managers; credit analysts; economists, forensic accountants and auditors; fraud examiners, investigators, and analysts; investment managers; and many more roles.

## Major Electives

FIN3319 Money and Banking  
 FIN4421 Financial Statement Analysis

## Free or Liberal Arts Electives

LAW2250 Wills, Trusts, and Estates  
 IBS3341 International Banking and Finance  
 IBS3320 International Business Law

**Certified Financial Planner™** - For students interested in a career as a Certified Financial Planner, the following elective courses are recommended. These courses enhance a student's ability to read and understand financial statements, insurance and the legal systems in which they will work and develop the necessary skills for success.

FIN3310 Insurance Planning  
 FIN4411 Retirement and Estate Planning  
 FIN4420 Comprehensive Financial Planning

BUS2255 Entrepreneurship  
 LAW2250 Wills, Trusts, and Estates  
 SOC2232 Social Psychology

**Financial Analyst** - Financial Analysts are the largest group of professionals working in the brokerage and investment management businesses. Analysts are employed in a wide range of industries, including Wall Street brokerage firms, corporations, regional securities firms, banks, insurance companies, mutual funds, and private foundations.

Securities analysts review companies and industries to determine the suitability for investment. They evaluate economic scenarios and their impact on portfolio holdings. They also prepare investment reports and recommendations, and measure investment results to determine the value of investments.

FIN3319 Insurance Planning  
 FIN4421 Retirement and Estate Planning

BUS2255 Entrepreneurship  
 BUS3342 Global Business Management

**Financial Enterprise Management** - Careers in financial enterprise management involve applying business and marketing skills. Potential roles include supply-chain management, financial management, purchasing, or product promotion. In some larger companies, work may be limited to a specific area of management including promotions, buying and selling, and finances. Some positions entail the supervision of projects and employees from multiple locations.

FIN4420 Comprehensive Financial Planning  
 FIN4421 Financial Statement Analysis  
 ECO4401 International Economics

BUS2255 Entrepreneurship  
 LAW3330 Employment Law  
 BUS3342 Global Business Management

**Insurance** - Insurance agents and brokers sell insurance, variable annuities, and related insurance products to new and existing clients. Insurance agents work as representatives for companies they represent and have a contractual agreement with these companies. Some agents are called underwriters because their duties may include estimating insurance risk in policies they write. Some brokers obtain insurance coverage (auto, health, or other insurance) usually provided in a comprehensive policy at a reduced premium rate. Some agents specialize in occupational groups, such as small business owners or physicians, to build up a stable client base and a source of repeat business.

FIN3310 Insurance Planning  
 FIN4411 Retirement and Estate Planning  
 FIN4420 Comprehensive Financial Planning

BUS2255 Entrepreneurship  
 LAW2250 Wills, Trusts, and Estates  
 SOC3320 Gender, Race, and Class

Under certain circumstances the need to take developmental College Skills courses may lengthen the time required to complete the student's program, and may result in increased costs to a student.

Not all programs and courses are offered at all campuses. You may be required to take some courses at another campus or online.

For more information about Berkeley College graduation rates, the median debt of students who completed programs, and other important disclosures, please visit [BerkeleyCollege.edu/gainful-employment/bba\\_financial\\_services\\_nj\\_statistics.htm](http://BerkeleyCollege.edu/gainful-employment/bba_financial_services_nj_statistics.htm) and [BerkeleyCollege.edu/gainful-employment/bba\\_financial\\_services\\_ny\\_statistics.htm](http://BerkeleyCollege.edu/gainful-employment/bba_financial_services_ny_statistics.htm).

Career Paths are not minors or concentrations and will not be noted on a student's transcript or diploma. Career Paths are suggested electives to fill elective credits.