



Banking and Finance

Course Description:

This course prepares students for employment in the field of banking and financial services. Students participating in this course will learn essential computer, financial, and professional skills. They will gain knowledge of the processes required to work as a clerk, an assistant to a financial planner and assistant to a banking officer within the financial sector, or to start their own business. Upon completion, students will be able to process cash deposits and withdrawals, process cheque and credit card payments, generate money orders and certified cheques, open accounts, sell traveller's cheques, trade stocks, balance daily transactions using calculators and computer programs, prepare customer statements, answer customer inquiries, and assist those who provide investment and financial advice. In addition, students will learn computer software applications, word processing and spreadsheets which are an asset to any position. This program includes modules such as customer service and business skills valuable to all occupations including working as a bank teller or assistant to various financial service providers. The objective of this program is to help the student develop the skills and competences needed to succeed in banking and finance positions in both the public and private sector.

Course Outline:

Microsoft Basics

Banking Fundamentals

Interpersonal and Business Communications

Course Outcomes:

At the end of the course the student will be able to:

- Process banking transactions, including cash deposits and withdrawals
- Balance daily transactions
- Process cheques, transfers, bill and credit card payments and money orders
- Open accounts and savings plans and assist in the purchasing of bonds
- Prepare customer statements and other correspondence for mailing
- Promote financial products and services
- Identify various types of trading and investments and apply trading principles
- Change foreign currency
- Understand financial management and financial planning



- Assist in providing financial and other information to clients
- Sort and file deposit slips
- Understand Insurance
- Understand Conduct and Practices Handbook
- Perform data entry
- Prepare financial statements
- Reconcile accounts
- Portfolio reviews and client meeting preparation
- Financial plan preparation
- Portfolio proposal preparation

Career Opportunities

Graduates of this certificate program will be able to start their career with entry-level positions in medium to large-sized companies as an:

- Bank Teller
- Commercial Teller
- Exchange Teller
- Foreign Banknote Teller
- Foreign Exchange Clerk
- Loan Teller
- Money Order Clerk
- Receiving Teller
- Savings Teller
- Securities Teller

Course Duration:

90 Hours