Financial Services

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Financial Services is a large and diverse industry with many career paths from which students may choose.

Accounting and QuickBooks
Banking and Finance
Insurance
CFP® Certification Education
Mortgage Banking (NMLS Approved)
Personal Finance
Real Estate and Appraisal Tax (http://www.theincometaxschool.com/cpcc)

The James R. Worrell, Sr. Financial Services Institute
Banking and finance courses and programs are offered through the James R. Worrell, Sr. Financial Services Institute located at the Harris Campus. Non-credit or continuing education courses cover requirements for pre-licensing, continuing education and professional development for a highly regulated industry. From the entry-level banking services representative course to more advanced analytical courses, individuals may enroll to begin a career, to change into a new career, or to build professional skills and credentials to get ahead.

For complete details about financial services programs, visit the Corporate and Continuing Education website for Financial Services (http://www.cpcc.edu/cce/job-and-career-enhancement/courses-and-programs/financial-services).

Scholarships
Scholarship opportunities are available for careers in financial services. Click to **download a PDF of the scholarship application.** (http://www.cpcc.edu/cce/job-and-career-enhancement/courses-and-programs/financial-services/financial-services-home/WachoviaScholarshipApplication.pdf)

ACC 7005. Cost Accounting and Management. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
Review the principles and objectives of cost accounting, production control, and inventory control, as they relate to management decision making and control processes within a company. Topics covered are Cost Accounting Fundamentals, Balancing of the 3 Factors - Cost, Volume & Profit, Concept of Relevant Information & Decision Making, Activitiy Based Costing, Cost Allocation Techniques, and Cost Variances & Control.

ACC 7007. Accounting Fundamentals. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
Increase your financial awareness while also gaining a marketable skill. You'll learn the basics of double-entry bookkeeping, as well as how to analyze and record financial transactions. Get hands-on experience with handling accounts receivable, accounts payable, payroll procedures, sales taxes and various common banking activities.

ACC 7008. Accounting Fundamentals II. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
This course builds on content from Accounting Fundamentals to provide you with an understanding of corporate accounting practices. Explore topics including special journals, uncollectible accounts receivable, plant assets,depreciation, notes and interest, accrued revenue and expenses, dividends, retained earnings and various financial reports for corporations.

ACC 7009. Administrative Assistant Applications. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
Discover how time management, accounting, business law, organizational behavior and management affect administrative assistant responsibilities and activities. Learn the basics of accounting, including the general ledger and key accounting terms, and see how financial statements and controls help keep your organization moving in a positive direction. Understand the fundamentals of business law, contracts and the principal-agency relationship; discover ethics and organizational politics; and understand the basics of human resources management.

BKC 8030. Professional Bookkeeper Certificate. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
Are you thinking about starting or enhancing your career as a bookkeeper? Gain a competitive edge by mastering the skills and knowledge of accounting functions utilized by professional bookkeepers. Topics will include: adjusting entries, correction of accounting errors, payroll, depreciation, inventory, and internal controls and fraud prevention. CPCC's Professional Bookkeeper Certificate prepares you to sit for the national bookkeeper certification through the American Institute of Professional Bookkeepers (AIPB). Students are encouraged to take exam modules as each subject is completed.

CBX 8020. Bank Teller Essentials. 0.0 Hours. Class-90.0. Clinical-0.0. Lab-0.0. Work-0.0
Position yourself for a career in the financial services industry with this entry-level banking course. You will learn the basics of the bank teller profession and acquire the skills and positive attitude that make today's tellers successful.

CFE 8001. CFP - Fundamentals of Financial Planning. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
Get a comprehensive overview of the financial planning process. Understand the roles and responsibilities of a financial planner and gain the analytical skills to aid in fiduciary decision-making. You will learn communication techniques, risk tolerance, time-value-of-money, regulatory issues and various financial planning applications.

CFE 8002. CFP - Insurance Planning. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
Understand the importance of insurance when it comes to financial planning. In this course, you will grasp basic concepts in risk management and the various types of insurance, such as property, casualty, life, health, disability and long-term care.

CFE 8003. CFP - Investment Planning. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
Discover the principles of investments and the various tools used in financial planning. Using this knowledge, you will be able to choose the appropriate investments to maximize your client's financial portfolio. Your client assessment will include tax considerations, economic factors, valuation methods, asset allocation techniques and performance evaluation.

CFE 8004. CFP - Income Tax Planning. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
Examine the federal income tax system and how it relates to individuals and their financial planning. Discover how various incomes, deductions, tax credits, capital gains and losses, life insurance and annuities, and taxation of business entities can all affect your client's portfolio.

CFE 8005. CFP - Retirement Planning. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
Every financial planning professional needs to know the essentials of retirement planning and employee benefits. Assist your clients in choosing the appropriate retirement plan to meet their needs, whether they are a business, business owner or an individual. Evaluate qualified plans, non-qualified plans and IRAs in designing the best retirement strategy for your clients.

CFE 8006. CFP - Estate Planning. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
Understand the various aspects of estate and gift tax planning, including the nature, valuation, transfer, administration and taxation of property. You will learn to strategize and develop a personalized estate plan to include trusts, wills, valuation of assets and buy-sell agreements. Textbook required.

CFE 8007. CFP - Financial Plan Development Course. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
This Capstone course is approved by the CFP Board of Standards, Inc. to satisfy the Financial Plan Development Course requirement. It is a comprehensive course where students will be able to apply the knowledge and skills acquired throughout the CFP(r) Certification Education Program toward the preparation, implementation and delivery of a financial plan.

FIN 7500. Financial Services Professional Certificate. 0.0 Hours. Class-90.0. Clinical-0.0. Lab-0.0. Work-0.0
If you enjoy building relationships with your customers and finding the right solutions for their financial needs, a career in the financial services industry might be right for you. CPCC's Financial Services Professional Certificate will give you basic knowledge and skills to advance your position in this versatile industry. Today's one-stop-shopping demands a comprehensive approach. Examine the key areas of banking, insurance, investments, retirement, loans and credit, and real estate. In this course you will discover a vast range of financial services positions to help you map out your career path.

SBX 7439. Basic Accounting With Quickbooks. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
Build a solid foundation by learning the fundamentals of accounting and how it relates within QuickBooks . Understand the chart of accounts and what happens when bills, checks and invoices are entered. No accounting knowledge or QuickBooks experience is required. Basic computer skills are required.

SBX 7440. Quickbooks Level 1. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
Discover how to manage and maintain your business finances by automating your accounting and financial reporting functions. Use this computerized program to set your company's chart of accounts, receive payments, pay bills, create lists, track cash sales, enter bills, create invoices, make deposits, reconcile bank accounts and write checks in order to more easily manage your financial decisions.

SBX 7460. Quickbooks Level 2. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
Already know the basics? This second level course will help you expand your Quickbooks knowledge. Delve into advanced features such as forms creation, report and graph generation, job costing, inventory, payroll and trouble shooting.

SBX 7480. Quickbooks Certified User: Exam Review and Certification Test. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
Stand out from the crowd as a QuickBooks Certified user. The exam prep will provide you with a review if you have completed QuickBooks Levels 1 and 2 and will prepare you for success on the exam. The exam validates your knowledge of QuickBooks Pro financial software, and if you score 80 percent or above, you will earn the industry recognized "QuickBooks Certified User" designation. The credential is ideal to add to you resume or to gain instant credibility as a bookkeeper, office manager or business owner. Prerequisite: Students seeking to sit for the examination are required to have completed SBX7440 and SBX7460.

TAX 7100. Chartered Tax Professional. 0.0 Hours. Class-440.0. Clinical-0.0. Lab-0.0. Work-0.0
A Chartered Tax Professional (CTP) is someone who has completed a specific series of tax courses in individual and small business income tax preparation. This nationally recognized innovative online certificate program will enable you to start working and earning money while completing coursework toward the CTP professional credential. After successfully completing this course, you will be qualified to prepare individual U.S. tax returns and will also have the tax knowledge to successfully pass the IRS Competency Exam.