



10-114-2 FINANCIAL SERVICES
30-114-1 FINANCIAL SERVICES CUSTOMER REPRESENTATIVE
2023-24 PROGRAM CURRICULUM CHECKLIST
NORTHWOOD TECHNICAL COLLEGE
ASHLAND*, NEW RICHMOND*, RICE LAKE*, SUPERIOR*
OUTREACH CENTERS: BALSAM LAKE*, HAYWARD*, LADYSMITH*
***Combination of Online, Your Choice, and On Site instruction**



Name/ID _____

Date _____

CATALOG NUMBER	COURSE TITLE	HOURS PER WEEK	CREDITS	FINANCIAL SERVICES CUSTOMER REPRESENTATIVE TECHNICAL DIPLOMA	FINANCIAL SERVICES ASSOCIATE DEGREE (Financial Aid Eligible)	DATE COMPLETED	TRANSFER OR GRADE
FIRST TERM - Fall 2023							
10101101	Financial Accounting 1	5 hours per week	4 credits	Financial Services Customer Representative	Financial Services		
10114125	Personal Finance	3 hours per week	3 credits	Financial Services Customer Representative	Financial Services		
10103146	MS Word A	2 hours per week	1 credit	Financial Services Customer Representative	Financial Services		
10103151	MS Excel A	2 hours per week	1 credit	Financial Services Customer Representative	Financial Services		
10103152	MS Excel B Corequisite: 10103151 MS Excel A	2 hours per week	1 credit	Financial Services Customer Representative	Financial Services		
10804123	Math with Business Applications	3 hours per week	3 credits		Financial Services		
10801136	English Composition 1	3 hours per week	3 credits		Financial Services		
	FIRST TERM TOTAL	20 hours per week		10 Credits Financial Services Customer Representative	16 Credits Financial Services		
SECOND TERM - Spring 2024							
10101103	Financial Accounting 2 Prerequisite: 10101101 Financial Accounting 1	5 hours per week	4 credits		Financial Services		
10114107	Principles of Finance	3 hours per week	3 credits	Financial Services Customer Representative	Financial Services		
10196189	Team Building and Problem Solving	3 hours per week	3 credits		Financial Services		
10103106	MS PowerPoint	2 hours per week	1 credit	Financial Services Customer Representative	Financial Services		
10801198 or 10801196	Speech or Oral/Interpersonal Communication	3 hours per week	3 credits		Financial Services		
10809195	Economics	3 hours per week	3 credits		Financial Services		
	SECOND TERM TOTAL	19 hours per week		4 Credits Financial Services Customer Representative	17 Credits Financial Services		

All finance classes run only on their assigned terms

All prerequisite/corequisite courses must be completed with a grade point of 2.0 or better.

Revised 6/14/2022



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THIRD TERM - Fall 2024							
10101138	Budgeting and Cost Control Corequisite: 10101101 Financial Accounting 1 or 10101176 Financial Accounting 1A	2 hours per week	2 credits		Financial Services		
10114192	Principles of Insurance	3 hours per week	3 credits		Financial Services		
10104102	Marketing Principles	4 hours per week	3 credits		Financial Services		
10104104	Selling Principles	4 hours per week	3 credits		Financial Services		
10105125	Business Law	3 hours per week	3 credits		Financial Services		
	THIRD TERM TOTAL	16 hours per week	14 credits		14 Credits Financial Services		
FOURTH TERM - Spring 2025							
10114103	Money and Banking	3 hours per week	3 credits		Financial Services		
10114150	Investments	3 hours per week	3 credits		Financial Services		
10196191	Supervision	3 hours per week	3 credits		Financial Services		
10809198 or 10809188	Introduction to Psychology or Developmental Psychology	3 hours per week	3 credits		Financial Services		
10890116	Job Quest	2 hours per week	1 credit		Financial Services		
	FOURTH TERM TOTAL	14 hours per week	13 credits		13 Credits Financial Services		
	PROGRAM REQUIREMENTS			14 Credits Financial Services Customer Representative	60 Credits Financial Services		

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Select the curriculum checklist based on the academic year you begin enrollment in your program. Students admitted mid-year (January) and/or any student who takes courses out of sequence are not guaranteed course availability in all terms of the program. Enrollment in additional terms may be required to complete graduation requirements. Please be advised that low enrollment class sections may be cancelled. You will be contacted by Student Services with information on other class sections available in alternate formats.

NORTHWOOD TECH GENERAL STUDIES COURSE OPTIONS FOR NORTHWOOD TECH ASSOCIATE DEGREE PROGRAMS

Co-enrollment in 99831900 Writing Essentials may be recommended in addition to English Composition 1.

Specific General Studies courses are scheduled as requirements for this program. If you have completed General Studies coursework at another Wisconsin technical college, please refer to the Acceptable Transfer Course document at the following link (find your program) to see if your previous coursework will transfer

[Acceptable Transfer Courses](#)

If you have completed General Studies coursework at Northwood Tech in a prior term, the same options will apply for your program requirements.

GRADUATION REQUIREMENTS: Although your academic advisor can provide guidance, you are ultimately responsible for selecting courses that meet a program's graduation requirements. If you do not take courses in the recommended sequence above, it may delay your completion of graduation requirements. A program plan grade point average (GPA) of 2.0 in a 4.0 grade system is required to graduate.

EARN CREDIT FOR WHAT YOU ALREADY KNOW:

[Visit Credit for Prior Learning for more information](#)

If you have difficulty accessing this content or notice any accessibility problems, please contact the Northwood Tech Curriculum Office at

curriculum.office@NorthwoodTech.edu

or 715.752.8128. You will receive a response within 5 business days.