



Bookkeeping and Financial Services Certificate Online – F102

235 hours

The competitive financial services market demands detailed product knowledge and high quality customer service. The Financial Services Industry Collection provides a six-part series of courses that develops and enhances account representatives' abilities to work with the financial services industry. The collection is designed to improve the learners' customer service and sales skills as well as their knowledge of the legal aspects affecting the financial services industry. Our courseware incorporates proven learning design methodology for effective and engaging interactive learning. The design of each course starts with the definition of learner-focused performance objectives and then proceeds to the selection and implementation of instructional strategies and learning activities appropriate for those objectives. Frequent practice questions or exercises, along with assessments, measure learners' achievement of those objectives.

Bookkeeping Curriculum

- Accounting 101
 - Accounting Fundamentals
 - Accrual Accounting Procedures
 - Accounting Systems and Closing Activities
 - Accounting for Cash Control
 - Accounting for Merchandising Businesses
 - TestPrep Final Exam: Accounting 101
- Finance Fundamentals for non-Finance Professionals
 - Principles of Financial Management
 - Basics of Budgeting
 - Managing Cash Flows
 - Understanding Financial Statements
- Practical Budgeting Skills for Business
 - Creating and Analyzing an Operating Budget
 - The Ins and Outs of Capital Budgeting
 - Effective Budget Management
- Advanced Business Finance
 - Introduction to Advanced Finance
 - Investment Project Analysis and Selection
 - Raising Capital and Financing Decisions
 - Managing Working Capital
 - Corporate Restructuring
 - Financial Risk Management
 - International Finance
 - TestPrep Final Exam: Advanced Business Finance
- Accounting 102
 - Accounting for Partnerships
 - Accounting for Corporations
 - Analyzing Cash Flow Statements
 - Master Budgets
 - TestPrep Final Exam: Accounting 102
- Auditing: A Practical Approach
 - Introduction to Auditing
 - Introduction to Internal Auditing
 - Principles of Internal Auditing
 - Introduction to External Auditing



- Principles of External Auditing
- Managerial Accounting
 - Overview of Managerial Accounting
 - Managerial Decisions and Capital Budgeting
 - Managing for Asset Control
 - Cost Accounting Decisions
- Using Financial Statements (co-Developed with Wharton)
 - Principles of Financial Statements
 - Components of Financial Statements
 - Analyzing the Income Statement and Balance Sheet
 - The Income Statement and Balance Sheet Connection
 - Analyzing Cash Flow
 - Ratio Analysis for Financial Statements
 - Credibility and Disclosure in an Annual Report
 - Analyzing an Annual Report
- Business Finance for Managers
 - Introduction to Finance
 - Making Budgets Work
 - Cash Management
 - Financial Statements and Analysis
 - Sources of Funding
 - Manager's Performance Guide - Business Finance
- Practical Budgeting for Managers
 - The Basics of Budgeting
 - Building an Operating Budget
 - Capital Budgeting
 - Managing Budgets Effectively

Financial Services Curriculum

- Retail Banking Essentials
 - Financial Planning
 - Consumer Credit Products
 - Trust Customer Referrals
 - Financial Planning Products
 - Insurance and Annuities Referrals
 - Making Securities Referrals
- Financial Services for New Account Representatives
 - The Financial Services Industry
 - Customer Service for New Account Representatives
 - Financial Service Representatives in Action
 - Sales for New Account Representatives
 - Savings and Checking for New Account Representatives
 - IRAs for New Account Representatives
 - Commercial Accounts for New Account Representatives
 - Legal Aspects for New Account Representatives
- Customer Service in the Financial Services Industry
 - Customer Service Improves Your Results
 - Knowing Your Customers -- The Key to Success
 - Essential Customer Service Communication Skills
 - Helping Your Customer to Make the Right Decisions
 - Continuous Customer Service
- Security Issues for Financial Institutions
 - Automated Teller Fraud



- Bank Security for Customer Contact Personnel
- Bank Security for Officers
- Embezzlement
- Forgeries and Counterfeits
- Identity Theft
- Dealing with Robberies