

Standards Correlations

Personal Finance (6121)

Task	SOL Correlations	EPF Standards	FBLA Correlations
Demonstrating Personal Qualities and Abilities			
Demonstrate creativity and innovation.	<p>English: 6.1, 6.3, 6.4, 6.6, 6.7, 6.9, 7.1, 7.3, 7.4, 7.6, 7.7, 7.9, 8.1, 8.3, 8.4, 8.6, 8.7, 8.9, 9.1, 9.5, 9.6, 9.8, 10.1, 10.5, 10.6, 10.8, 11.1, 11.5, 11.6, 11.8, 12.1, 12.5, 12.6, 12.8</p> <p>History and Social Science: CE.1, CE.4, GOVT.1, USI.1, USII.1, VUS.1, WG.1, WG.4, WHI.1, WHII.1</p> <p>Mathematics: 6.1, 6.2, 6.3, 6.4, 6.5, 6.6, 6.7, 6.10, 6.11, 6.12, 7.2, 7.3, 7.8, 7.9, 8.2, 8.4, 8.6, 8.7, 8.11, 8.12, 8.17, 8.18, A.9, AFDA.3, AFDA.4, AFDA.5, AFDA.6, AFDA.7, AFDA.8, AII.9, COM.1, COM.3, COM.4, COM.5, COM.8, DM.7, DM.1*, DM.10, DM.2*, DM.3*, PS.3*, PS.4*, PS.7*, PS.9*, PS.10*</p> <p>Science: 6.1, BIO.1, CH.1, ES.1, LS.1, PS.1</p>		
Demonstrate critical thinking and problem solving.	<p>English: 6.1, 6.3, 6.4, 6.5, 6.6, 6.7, 6.9, 7.1, 7.3, 7.4, 7.5, 7.6, 7.7, 7.9, 8.1, 8.3, 8.4, 8.5, 8.6, 8.7, 8.9, 9.1, 9.5, 9.6, 9.8, 10.1, 10.5, 10.6, 10.8, 11.1, 11.5, 11.6, 11.8, 12.1, 12.5, 12.6, 12.8</p>		

Task	SOL Correlations	EPF Standards	FBLA Correlations
	History and Social Science: CE.1, CE.4, CE.11, GOVT.1, USI.1, USII.1, VUS.1, WG.1, WG.4, WHI.1, WHII.1 Mathematics: 6.1, 6.2, 6.3, 6.4, 6.5, 6.6, 6.10, 6.11, 7.2, 7.3, 7.8, 7.12, 7.13, 8.2, 8.4, 8.8, 8.9, 8.10, 8.11, A.8, A.9, G.1, G.13, G.14, AFDA.3, AFDA.5, AFDA.8, AII.9, AII.10, AII.11, COM.1, COM.3, COM.4, COM.5, COM.8, DM.4, DM.7, DM.1*, DM.2*, DM.3*, DM.9*, PS.9*, PS.10* Science: 6.1, BIO.1, CH.1, ES.1, LS.1, PS.1		
Demonstrate initiative and self-direction.	English: 6.1, 6.4, 6.6, 6.7, 6.9, 7.1, 7.4, 7.6, 7.7, 7.9, 8.1, 8.4, 8.6, 8.7, 8.9, 9.1, 9.5, 9.6, 9.8, 10.1, 10.5, 10.6, 10.8, 11.1, 11.5, 11.6, 11.8, 12.1, 12.5, 12.6, 12.8 History and Social Science: CE.1, CE.4, CE.11, GOVT.1, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1		
Demonstrate integrity.	English: 6.1, 7.1, 8.1, 9.1, 9.5, 10.1, 10.5, 11.1, 11.5, 12.1, 12.5 History and Social Science: CE.1, CE.3, CE.4, GOVT.1, GOVT.16, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1		
Demonstrate work ethic.	English: 6.1, 7.1, 8.1, 9.1, 10.1, 11.1, 12.1 History and Social Science: CE.1, CE.4, CE.14, GOVT.1, GOVT.16, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1 Science: CH.1		
Demonstrating Interpersonal Skills			

Task	SOL Correlations	EPF Standards	FBLA Correlations
Demonstrate conflict-resolution skills.	English: 6.1, 6.2, 6.4, 6.6, 6.7, 6.9, 7.1, 7.2, 7.4, 7.6, 7.7, 7.9, 8.1, 8.2, 8.4, 8.6, 8.7, 8.9, 9.1, 10.1, 11.1, 12.1 History and Social Science: CE.1, CE.4, GOVT.1, USI.1, VUS.1		
Demonstrate listening and speaking skills.	English: 6.1, 6.2, 6.4, 6.6, 7.1, 7.2, 7.4, 7.6, 8.1, 8.2, 8.4, 8.6, 9.1, 10.1, 11.1, 12.1 History and Social Science: CE.1, CE.4, GOVT.1, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1		
Demonstrate respect for diversity.	English: 6.1, 7.1, 8.1, 9.1, 10.1, 11.1, 12.1 History and Social Science: CE.1, CE.3, CE.4, GOVT.1, GOVT.16, USI.1, USII.1, USII.9, VUS.1, VUS.13, WG.1, WHI.1, WHII.1		
Demonstrate customer service skills.	English: 6.1, 6.4, 6.7, 7.1, 7.4, 7.7, 8.1, 8.4, 8.7, 9.1, 9.5, 9.6, 10.1, 10.5, 10.6, 11.1, 11.5, 11.6, 12.1, 12.5, 12.6 History and Social Science: CE.1, CE.4, GOVT.1, GOVT.16, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1		
Collaborate with team members	English: 6.1, 7.1, 8.1, 9.1, 10.1, 11.1, 12.1 History and Social Science: CE.1, CE.3, CE.4, GOVT.1, GOVT.16, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1		
Demonstrating Professional Competencies			
Demonstrate big-picture thinking.	English: 6.1, 6.4, 7.1, 7.4, 8.1, 8.4, 9.1, 9.5, 10.1, 10.5, 11.1, 11.5, 12.1, 12.5		

Task	SOL Correlations	EPF Standards	FBLA Correlations
	History and Social Science: CE.1, CE.4, CE.12, GOVT.1, GOVT.15, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1		
Demonstrate career- and life-management skills.	English: 6.1, 6.7, 7.1, 7.7, 8.1, 8.7, 9.1, 9.6, 10.1, 10.6, 11.1, 11.6, 12.1, 12.6 History and Social Science: CE.1, CE.4, CE.12, CE.14, GOVT.1, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1 Mathematics: 8.4		
Demonstrate continuous learning and adaptability.	English: 6.1, 6.4, 6.7, 6.9, 7.1, 7.4, 7.7, 7.9, 8.1, 8.4, 8.7, 8.9, 9.1, 9.5, 9.6, 9.8, 10.1, 10.5, 10.6, 10.8, 11.1, 11.5, 11.6, 11.8, 12.1, 12.5, 12.6, 12.8 History and Social Science: CE.1, CE.3, CE.4, CE.14, GOVT.1, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1 Science: BIO.1, CH.1, LS.1, PH.1, PH.4, PS.1		
Manage time and resources.	English: 6.1, 6.2, 6.4, 6.7, 6.9, 7.1, 7.2, 7.4, 7.7, 7.9, 8.1, 8.2, 8.4, 8.7, 8.9, 9.1, 9.5, 9.6, 9.8, 10.1, 10.5, 10.6, 10.8, 11.2, 11.5, 11.6, 11.8, 12.2, 12.5, 12.6, 12.8 History and Social Science: CE.1, CE.4, CE.11, GOVT.1, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1 Mathematics: 6.10, 6.11, 6.12, 7.2, 7.3, 7.8, 7.9, 7.10, 7.11, 7.12, 7.13, 8.4, 8.11, 8.12, 8.13, 8.14, 8.17, 8.18, A.4, A.5, A.8, A.9, AFDA.3, AFDA.4, AFDA.5, AFDA.6, AFDA.7, AFDA.8, COM.1, COM.3, COM.5, COM.8		

Task	SOL Correlations	EPF Standards	FBLA Correlations
Demonstrate information-literacy skills.	English: 6.1, 6.2, 6.4, 6.6, 6.7, 6.9, 7.1, 7.2, 7.3, 7.4, 7.6, 7.7, 7.9, 8.1, 8.2, 8.3, 8.4, 8.6, 8.7, 8.9, 9.2, 9.5, 9.6, 9.8, 10.2, 10.5, 10.6, 10.8, 11.2, 11.5, 11.6, 11.8, 12.2, 12.5, 12.6, 12.8 History and Social Science: CE.1, CE.4, CE.14, GOVT.1, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1 Mathematics: 6.10, 6.11, 7.8, 7.9, 8.11, 8.12, A.8, A.9, AFDA.3, AFDA.4, AFDA.6, AFDA.7, AFDA.8, DM.8, PS.1*, PS.2*, PS.3*, PS.4*, PS.7*, PS.8*, PS.9*, PS.10* Science: 6.1, BIO.1, CH.1, ES.1, LS.1, PH.1, PS.1		
Demonstrate an understanding of information security.	English: 6.1, 6.2, 6.3, 6.4, 6.6, 6.7, 6.8, 6.9, 7.1, 7.2, 7.3, 7.4, 7.6, 7.7, 7.8, 7.9, 8.1, 8.2, 8.3, 8.4, 8.6, 8.7, 8.8, 8.9, 9.1, 9.2, 9.5, 9.6, 9.8, 10.1, 10.2, 10.5, 10.6, 10.8, 11.1, 11.2, 11.5, 11.6, 11.8, 12.1, 12.2, 12.5, 12.6, 12.8 History and Social Science: CE.1, CE.4, CE.14, GOVT.1, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1 Mathematics: COM.10		
Maintain working knowledge of current information-technology (IT) systems.	English: 6.1, 6.3, 6.4, 6.6, 6.9, 7.1, 7.3, 7.4, 7.6, 7.9, 8.1, 8.3, 8.4, 8.6, 8.9 History and Social Science: CE.1, CE.4, CE.14, GOVT.1, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1 Mathematics: 7.8, COM.1, COM.2, COM.7, COM.9, COM.10, COM.11, COM.16, COM.18, PS.17 Science: BIO.1, CH.1, ES.1, PH.1		

Task	SOL Correlations	EPF Standards	FBLA Correlations
Demonstrate proficiency with technologies, tools, and machines common to a specific occupation.	History and Social Science: CE.1, CE.4, CE.14, GOVT.1, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1 Mathematics: 6.10, 6.11, 7.9, 8.4, A.7, A.8, A.9, AFDA.1, AFDA.3, AFDA.5, AII.4, AII.7, AII.9, COM.1, COM.7, COM.10, COM.11, COM.12, COM.16 Science: CH.1, ES.1, LS.1, PH.1, PS.1		
Apply mathematical skills to job-specific tasks.	English: 6.4, 6.6, 6.7, 7.4, 7.6, 7.7, 8.4, 8.6, 8.7, 9.5, 9.6, 10.5, 10.6, 11.5, 11.6, 12.5, 12.6 History and Social Science: CE.1, CE.4, CE.14, GOVT.1, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1 Mathematics: 6.1, 6.2, 6.5, 6.6, 6.12, 6.13, 6.14, 7.1, 7.2, 7.3, 7.4, 7.5, 7.6, 7.8, 7.9, 7.11, 7.12, 7.13, 8.4, 8.5, 8.6, 8.8, 8.9, 8.10, 8.11, 8.12, 8.13, 8.14, 8.15, 8.16, 8.17, 8.18, A.1, A.3, A.4, A.5, A.7, A.8, A.9, AFDA.1, AFDA.3, AFDA.5, AFDA.8, AII.3, AII.7, AII.9, AII.10, COM.1, COM.7 Science: 6.1, BIO.1, CH.1, ES.1, LS.1, PH.1, PS.1		
Demonstrate professionalism.	English: 6.1, 7.1, 8.1, 9.1, 10.1, 11.1, 12.1 History and Social Science: CE.1, CE.4, CE.14, GOVT.1, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1		
Demonstrate reading and writing skills.	English: 6.1, 6.6, 6.7, 7.1, 7.6, 7.7, 8.1, 8.6, 8.7, 9.1, 9.5, 9.6, 9.7, 10.1, 10.5, 10.6, 10.7, 11.1, 11.5, 11.6, 11.7, 12.1, 12.5, 12.6, 12.7 History and Social Science: CE.1, CE.4, GOVT.1, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1 Science: 6.1, PH.1, PS.1		

Task	SOL Correlations	EPF Standards	FBLA Correlations
Demonstrate workplace safety.	English: 6.4, 7.4, 8.4, 9.5, 10.5, 11.5, 12.5 History and Social Science: CE.1, CE.4, GOVT.1, USI.1, USII.1, VUS.1, WG.1, WHI.1, WHII.1 Science: CH.1		
Examining All Aspects of an Industry			
Examine aspects of planning within an industry/organization.	History and Social Science: GOVT.16		
Examine aspects of management within an industry/organization.			
Examine aspects of financial responsibility within an industry/organization.			
Examine technical and production skills required of workers within an industry/organization.			
Examine principles of technology that underlie an industry/organization.			
Examine labor issues related to an industry/organization.	History and Social Science: GOVT.16		

Task	SOL Correlations	EPF Standards	FBLA Correlations
Examine community issues related to an industry/organization.	History and Social Science: GOVT.16		
Examine health, safety, and environmental issues related to an industry/organization.	History and Social Science: GOVT.16		
Addressing Elements of Student Life			
Identify the purposes and goals of the student organization.			
Explain the benefits and responsibilities of membership in the student organization as a student and in professional/civic organizations as an adult.			
Demonstrate leadership skills through participation in student organization activities, such as meetings, programs, and projects.			
Identify Internet safety issues and procedures for complying with acceptable use standards.			

Task	SOL Correlations	EPF Standards	FBLA Correlations
Exploring Work-Based Learning			
Identify the types of work-based learning (WBL) opportunities.			
Reflect on lessons learned during the WBL experience.			
Explore career opportunities related to the WBL experience.			
Participate in a WBL experience, when appropriate.			
Developing Consumer Skills			
Examine basic economic concepts and their relation to product prices and consumer spending.	<p>English: 10.5, 11.5, 12.5</p> <p>History and Social Science: Govt 14</p>	EPF 10a	<p>Accounting I</p> <p>Accounting II</p> <p>Agribusiness</p> <p>American Enterprise Project</p> <p>Banking & Financial Systems</p> <p>Business Financial Plan</p> <p>Business Management</p> <p>Business Plan</p> <p>Economics</p> <p>Entrepreneurship</p> <p>International Business</p> <p>Personal Finance</p> <p>Political Science</p> <p>Securities and Investments</p>

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Supply Chain Management
Examine the effect of supply and demand on wages and prices.	English: 10.5, 11.5, 12.5 History and Social Science: Govt 14	EPF 3b, 4e	Accounting I Accounting II Agribusiness American Enterprise Project Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Political Science Securities and Investments Supply Chain Management
Describe the steps for making a purchase decision.	English: 10.5, 11.5, 12.5	EPF 10c	Accounting I Accounting II Agribusiness American Enterprise Project Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Political Science

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Securities and Investments Supply Chain Management
Describe common types of contracts and the implications of each.	English: 10.5, 11.5, 12.5	EPF 10b	Accounting I Accounting II Agribusiness American Enterprise Project Banking & Financial Systems Business Financial Plan Business Law Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Political Science Securities and Investments Supply Chain Management
Demonstrate comparison-shopping skills.	English: 10.5, 11.5, 12.5	EPF 10c	Accounting I Accounting II Agribusiness American Enterprise Project Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Personal Finance Political Science Securities and Investments Supply Chain Management
Maintain a secure system for personal financial records.	English: 10.5, 11.5, 12.5	EPF 10d	Accounting I Accounting II Agribusiness American Enterprise Project Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Political Science Securities and Investments Supply Chain Management
Examine the impact of advertising and marketing on consumer demand and decision making in the global marketplace.	English: 10.5, 11.5, 12.5	EPF 10e EPF 10g	Accounting I Accounting II Agribusiness American Enterprise Project Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Personal Finance Political Science Securities and Investments Supply Chain Management
Access reliable financial information from a variety of sources.	English: 10.5, 11.5, 12.5	EPF 10f	Accounting I Accounting II Agribusiness American Enterprise Project Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Political Science Securities and Investments Supply Chain Management
Explain consumer rights, responsibilities, remedies, and the importance of consumer vigilance.	English: 10.5, 11.5, 12.5	EPF 10g	Accounting I Accounting II Agribusiness American Enterprise Project Banking & Financial Systems Business Financial Plan Business Law Business Management Business Plan Economics Entrepreneurship

Task	SOL Correlations	EPF Standards	FBLA Correlations
			International Business Personal Finance Political Science Securities and Investments Supply Chain Management
Examine precautions for protecting identity and other personal information.	English: 10.5, 11.5, 12.5	EPF 10h	Accounting I Accounting II Agribusiness American Enterprise Project Banking & Financial Systems Business Financial Plan Business Law Business Management Business Plan Cyber Security Economics Entrepreneurship International Business Personal Finance Political Science Securities and Investments Supply Chain Management
Interact effectively with salespersons and merchants.	English: 10.5, 11.5, 12.5		Accounting I Accounting II Agribusiness American Enterprise Project Banking & Financial Systems Business Financial Plan Business Management Business Plan

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Business Procedures Economics Entrepreneurship International Business Personal Finance
Describe consumer protection regulations.	English: 10.5, 11.5, 12.5 History and Social Science: Govt 15		Accounting I Accounting II Agribusiness American Enterprise Project Banking & Financial Systems Business Financial Plan Business Law Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Political Science Securities and Investments Supply Chain Management
Describe the role of consumer assistance agencies.	English: 10.5, 11.5, 12.5 History and Social Science: Govt 15		Accounting I Accounting II Agribusiness American Enterprise Project Banking & Financial Systems Business Financial Plan Business Law Business Management Business Plan

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Economics Entrepreneurship International Business Personal Finance Political Science Securities and Investments Supply Chain Management
Demonstrating Knowledge of Planning for Living and Leisure Expenses			
Compare the costs and benefits of purchasing vs. leasing a vehicle and other methods of transportation.	English: 10.5, 11.5, 12.5	EPF 11a, 11b	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments Supply Chain Management
Compare the advantages and disadvantages of renting vs. purchasing a residence.	English: 10.5, 11.5, 12.5	EPF 11c	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Personal Finance Securities and Investments
Describe the process of renting a residence.	English: 10.5, 10.8, 11.5, 11.8, 12.5, 12.8	EPF 11d	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Describe the process of purchasing a residence.	English: 10.5, 11.5, 12.5	EPF 11e	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Calculate the cost of utilities, services, maintenance, and other housing expenses involved in independent living.		EPF 11f	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Economics Entrepreneurship International Business Personal Finance Securities and Investments
Evaluate discretionary spending decisions.	English: 10.5, 11.5, 12.5	EPF 11g	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Demonstrating Knowledge of Banking Transactions			
Describe the types of financial institutions.	English: 10.5, 11.5, 12.5		Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments

Task	SOL Correlations	EPF Standards	FBLA Correlations
Examine how financial institutions affect personal financial planning.	English: 10.5, 11.5, 12.5	EPF 12f	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Evaluate services and related costs associated with personal banking.	English: 10.5, 11.5, 12.5	EPF 12a	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Compare contemporary, non-traditional methods of payment between parties.	English: 10.5, 11.5, 12.5		Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship

Task	SOL Correlations	EPF Standards	FBLA Correlations
			International Business Personal Finance Securities and Investments
Differentiate among types and regulations of electronic monetary transactions.	English: 10.5, 11.5, 12.5	EPF 12b	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Prepare all forms necessary for opening and maintaining a checking and a savings account.	English: 10.5, 10.6, 10.7, 11.5, 11.6, 11.7, 12.5, 12.6, 12.7	EPF 12c	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Reconcile bank statements.	English: 10.5, 10.6, 11.5, 11.6, 12.5, 12.6	EPF 12d	Accounting I Accounting II Banking & Financial Systems Business Financial Plan

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Compare costs and benefits of online, mobile, and traditional banking.	English: 10.5, 11.5, 12.5	EPF 12e	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Explain how certain historical events have influenced the banking system and other financial institutions.	English: 10.5, 10.8, 11.5, 11.8, 12.5, 12.8 History and Social Science: WH 10,11, 14 US 10, 11, 14 Govt 15	EPF 6f	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments

Task	SOL Correlations	EPF Standards	FBLA Correlations
Compare the U.S. monetary system with the international monetary system.	English: 10.5, 11.5, 12.5 History and Social Science: WHII 14 US 14 Govt 15	EPF 6e	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Demonstrating Knowledge of Credit and Loan Functions			
Evaluate the various methods of financing a purchase.	English: 10.3, 10.5, 11.3, 11.5, 12.3, 12.5	EPF 13a	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Analyze credit card features and their impact on personal financial planning.	English: 10.5, 11.5, 12.5	EPF 13b	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Economics Entrepreneurship International Business Personal Finance Securities and Investments
Identify qualifications needed to obtain credit.	English: 10.5, 11.5, 12.5	EPF 13c	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Identify basic provisions of credit and loan laws.	English: 10.5, 11.5, 12.5	EPF 13d	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Law Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments

Task	SOL Correlations	EPF Standards	FBLA Correlations
Compare terms and conditions of various sources of consumer credit.	English: 10.3, 10.5, 11.3, 11.5, 12.3, 12.5	EPF 13e	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Identify strategies for effective debt management, including sources of assistance.	English: 10.5, 11.5, 12.5	EPF 13f	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Explain credit rating and credit report.	English: 10.5, 11.5, 12.5	EPF 13g	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship

Task	SOL Correlations	EPF Standards	FBLA Correlations
			International Business Personal Finance Securities and Investments
Compare the costs and conditions of secured and unsecured loans.	English: 10.5, 11.5, 12.5	EPF 13h	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Compare amortization schedules for loans.	English: 10.5, 11.5, 12.5	EPF 13j	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Compare the types of voluntary and involuntary bankruptcy and the implications of each.	English: 10.5, 11.5, 12.5	EPF 13i	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Calculate payment schedules for a loan, using spreadsheets, calculators, and/or online tools.	English: 10.5, 11.5, 12.5 Mathematics: COM.1, COM.4, COM.6, COM.7, COM.9, COM.13, COM.14		Accounting I Accounting II Banking & Financial Systems Business Calculations Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments
Complete a sample credit application.	English: 10.6, 10.7, 11.6, 11.7, 12.6, 12.7	EFP 13c	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship International Business Personal Finance Securities and Investments

Task	SOL Correlations	EPF Standards	FBLA Correlations
Demonstrating Knowledge of the Role of Insurance in Risk Management			
Evaluate insurance as a risk-management strategy.	English: 10.3, 10.5, 11.3, 11.5, 12.3, 12.5	EPF 14b	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Insurance and Risk Management International Business Personal Finance Securities and Investments
Distinguish among the types, costs, and benefits of automobile insurance coverage.	English: 10.5, 11.5, 12.5	EPF 14c	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Insurance and Risk Management International Business Personal Finance Securities and Investments
Distinguish among the types, costs, and benefits of life insurance.	English: 10.5, 11.5, 12.5	EPF 14c EPF 14d	Accounting I Accounting II Banking & Financial Systems Business Financial Plan

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Business Management Business Plan Economics Entrepreneurship Insurance and Risk Management International Business Personal Finance Securities and Investments
Distinguish among the types, costs, and benefits of property insurance.	English: 10.5, 11.5, 12.5	EPF 14c	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Insurance and Risk Management International Business Personal Finance Securities and Investments
Distinguish among the types, costs, and benefits of health insurance.	English: 10.5, 11.5, 12.5	EPF 14c	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Insurance and Risk Management

Task	SOL Correlations	EPF Standards	FBLA Correlations
			International Business Personal Finance Securities and Investments
Explain the roles of insurance in financial planning.	English: 10.5, 11.5, 12.5	EPF 14a	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Insurance and Risk Management International Business Personal Finance Securities and Investments
Distinguish among the types of professional liability insurance.	English: 10.5, 11.5, 12.5		Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Law Business Management Business Plan Economics Entrepreneurship Insurance and Risk Management International Business Personal Finance Securities and Investments
Demonstrating Knowledge of Income Earning and Reporting			

Task	SOL Correlations	EPF Standards	FBLA Correlations
Examine how personal choices about education, training, skill development, and careers impact earnings.	English: 10.5, 11.5, 12.5	EPF 4a, 4c	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Insurance and Risk Management International Business Personal Finance Securities and Investments
Differentiate among employment arrangements and sources of income.	English: 10.5, 11.5, 12.5	EPF 15a	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Insurance and Risk Management International Business Personal Finance Securities and Investments
Explain the content and purpose of a standard W-2 and 1099 form.	English: 10.5, 11.5, 12.5	EPF 15g	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Calculate net pay.		EPF 15b	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Investigate employee benefits and incentives.	English: 10.5, 10.8, 11.5, 11.8, 12.5, 12.8	EPF 15c	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management

Task	SOL Correlations	EPF Standards	FBLA Correlations
			International Business Personal Finance Securities and Investments
Complete standard federal employment tax forms.		EPF 15h 15i	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Demonstrating Knowledge of Taxes			
Describe the types and purposes of local, state, and federal taxes and the way each is levied and used.	English: 10.5, 11.5, 12.5 History and Social Science: Govt 9, 15	EPF 15d	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Securities and Investments
Explore how tax structures affect consumers, producers, business owners, and individual of varying income levels differently.	English: 10.5, 11.5, 12.5	EPF 15e	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Compute local taxes on products and services.	History and Social Science: Govt 9, 15	EPF 15f	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Explain the similarities and differences between state	English: 10.5, 11.5, 12.5 History and Social Science:		Accounting I Accounting II Banking & Financial Systems

Task	SOL Correlations	EPF Standards	FBLA Correlations
and federal taxation of inheritances.	Govt 9, 15		Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Examine potential tax deductions and credits on a tax return.	English: 10.5, 11.5, 12.5		Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Define the terminology associated with inheritance.	English: 10.3, 11.3, 12.3	EF 16c	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Compare investment options for a monetary inheritance.	English: 10.5, 11.5, 12.5		Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Examine types and purposes of estate planning.	English: 10.5, 11.5, 12.5		Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Personal Finance Securities and Investments
Complete a state income tax form, including electronic formats.	English: 10.3, 10.5, 10.8, 11.3, 11.5, 11.8, 12.3, 12.5, 12.8 History and Social Science: Govt 9, 15	EPF 15h	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Complete short and itemized federal income tax forms, including electronic formats.	English: 10.8, 11.8, 12.8 History and Social Science: Govt 9, 15	EPF 15h	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Demonstrating Knowledge of Personal Financial Planning			

Task	SOL Correlations	EPF Standards	FBLA Correlations
Identify short-term and long-term personal financial goals.	English: 10.3, 10.5, 11.3, 11.5, 12.3, 12.5	EPF 16a	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Identify anticipated and unanticipated income and expenses.	English: 10.5, 11.5, 12.5	EPF 16b	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Examine components and purposes of a personal net worth statement.	English: 10.3, 10.5, 11.3, 11.5, 12.3, 12.5	EPF 16c EPF 16d	Accounting I Accounting II Banking & Financial Systems Business Financial Plan

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Develop a personal budget.	English: 10.1, 10.6, 10.7, 11.1, 11.6, 11.7, 12.1, 12.6, 12.7	EPF 16e	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Investigate the effects of government actions and economic conditions on personal financial planning.	English: 10.5, 11.5, 12.5 History and Social Science: Govt 9, 14, 15	EPF 16f	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Explain how economics influences a personal financial plan.	English: 10.5, 11.5, 12.5 History and Social Science: Govt 9, 15	EPF 16g	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Examine the fundamental workings of the Social Security system and the system's effects on retirement planning.	English: 10.5, 11.5, 12.5 History and Social Science: Govt 9, 15	EPF 17c	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Securities and Investments
Compare alternative retirement plans.	English: 10.5, 11.5, 12.5	EPF 17d	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Demonstrating Knowledge of Investment and Savings Planning			
Compare the impact of simple interest vs. compound interest on savings.	English: 10.5, 11.5, 12.5 History and Social Science: Govt 9, 15	EPF 17a	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Insurance and Risk Management International Business Personal Finance Securities and Investments
Compare investment and savings options.	English: 10.5, 11.5, 12.5	EPF 17b	Accounting I Accounting II

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Explain costs and income sources for investments.	English: 10.5, 11.5, 12.5		Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Explore how the stock and bond markets work.	English: 10.5, 11.5, 12.5 History and Social Science: Govt 9, 15	EPF 17e	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Identify investment products.	English: 10.5, 11.5, 12.5		Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Financing Education after High School			
Identify sources of financial aid.	English: 10.5, 11.5, 12.5 History and Social Science: Govt 9, 14, 15	EPF 18b EPF 18c	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Explain how to apply for financial aid for post-secondary education and training.	English: 10.5, 10.8, 11.5, 11.8, 12.5, 12.8 History and Social Science: Govt 9, 14, 15	EPF 18l	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Explain how to remain eligible for financial aid for post-secondary education and training.	English: 10.5, 11.5, 12.5 History and Social Science: Govt 9, 14, 15	EPF 18g	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Securities and Investments
Examine types of student loans.	English: 10.5, 11.5, 12.5	EPF 18c EPF 18f EPF 18l	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Explain the repayment process for student loans.	English: 10.5, 11.5, 12.5	EPF 18h EPF 18i EPF 18m	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Describe types of student grants.	English: 10.5, 10.8, 11.5, 11.8, 12.5, 12.8	EPF 18d	Accounting I Accounting II Banking & Financial Systems

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Describe types of scholarships.	English: 10.3, 10.5, 11.3, 11.5, 12.3, 12.5	EPF 18e	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments Scholarships
Describe investment options to pay for postsecondary education costs.	English: 10.5, 11.5, 12.5	EPF 17d EPF 18j	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan

Task	SOL Correlations	EPF Standards	FBLA Correlations
			Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Identify ways to make the cost of postsecondary education affordable.	English: 10.5, 10.8, 11.5, 11.8, 12.5, 12.8	EPF 18a EPF 18k EPF 18n	Accounting I Accounting II Banking & Financial Systems Business Financial Plan Business Management Business Plan Economics Entrepreneurship Human Resource Management Insurance and Risk Management International Business Personal Finance Securities and Investments
Preparing for Industry Certification			
Describe the process and requirements for obtaining industry certifications related to the Economics and Personal Finance course.	English: 10.5, 10.8, 11.5, 11.8, 12.5, 12.8		Economics Electronic Career Portfolio Entrepreneurship Human Resource Management Job Interview Personal Finance

Task	SOL Correlations	EPF Standards	FBLA Correlations
Identify testing skills/strategies for a certification examination.	English: 10.5, 10.8, 11.5, 11.8, 12.5, 12.8		All objective test events
Demonstrate ability to successfully complete selected practice examinations (e.g., practice questions similar to those on certification exams).			Computer Applications Database Design and Application Spread Sheet Application Word Processing
Successfully complete an industry certification examination representative of skills learned in this course (e.g., W!SE Financial Literacy Examination).	English: 10.5, 10.6, 10.7, 11.5, 11.6, 11.7, 12.5, 12.6, 12.7		Computer Applications Database Design and Application Spread Sheet Application Word Processing
Developing Career Exploration and Employability Skills			
Investigate career opportunities.	English: 10.5, 10.8, 11.5, 11.8, 12.5, 12.8		Electronic Career Portfolio Human Resource Management Future Business Leader Job Interview Scholarships
Identify personal interests, aptitudes, and attitudes related to the characteristics found in successful workers.	English: 10.5, 10.8, 11.5, 11.8, 12.5, 12.8		Electronic Career Portfolio Human Resource Management Future Business Leader Job Interview Scholarships

Task	SOL Correlations	EPF Standards	FBLA Correlations
Prepare a professional portfolio.	English: 10.1, 10.6, 10.7, 11.1, 11.6, 11.7, 12.1, 12.6, 12.7		Electronic Career Portfolio Human Resource Management Future Business Leader Job Interview Scholarships
Research a company in preparation for a job interview.	English: 10.8, 11.8, 12.8		Electronic Career Portfolio Human Resource Management Future Business Leader Job Interview Scholarships
Participate in mock interviews to refine interviewing techniques.	English: 10.1, 11.1, 12.1		Electronic Career Portfolio Human Resource Management Future Business Leader Job Interview Scholarships
Prepare employment-related correspondence.	English: 10.6, 10.7, 11.6, 11.7, 12.6, 12.7		Electronic Career Portfolio Human Resource Management Future Business Leader Job Interview Scholarships