



**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
<b>FIRST TERM - Fall 2023</b>							
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		
	<b>FIRST TERM TOTAL</b>	20 hours per week		10 Credits Financial Services Customer Representative	16 Credits Financial Services		
<b>SECOND TERM - Spring 2024</b>							
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		
	<b>SECOND TERM TOTAL</b>	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 6/15/2023



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<b>THIRD TERM - Fall 2024</b>							
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		
	<b>THIRD TERM TOTAL</b>	16 hours per week	14 credits		14 Credits Financial Services		
<b>FOURTH TERM - Spring 2025</b>							
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		
	<b>FOURTH TERM TOTAL</b>	14 hours per week	13 credits		13 Credits Financial Services		
	<b>PROGRAM REQUIREMENTS</b>			<b>14 Credits</b> Financial Services Customer Representative	<b>60 Credits</b> 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 canceled. 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.

Pending Dean approval, technical diploma coursework (i.e. catalog number beginning with 30, 31, or 32) may also be allowed to meet general studies requirements. NOTE: Technical diploma level coursework may not transfer to a baccalaureate program.<sup>^</sup>

*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*

**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](mailto:curriculum.office@NorthwoodTech.edu)

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

<sup>^</sup>If considering transferring into a baccalaureate program, please work with the Transfer Coordinator at the college you are interested in transferring to verify status, including if technical diploma level coursework will transfer and if it will transfer, how the credits will be brought in to your future degree.