

High School Curriculum Guides

Toronto Finance International has developed a resource section for teachers and students to support the exploration of financial services careers. TFI's [Career Advisor website](#) offers a career assessment tool and detailed information on 35 in-demand jobs. Curriculum Guides have been developed to support teachers to bring this information to their students in an interesting and engaging way.

Curriculum guides had been developed for the following courses (Ontario course code provided):

- Financial Accounting Fundamentals (BAF3M)
- Financial Accounting Principles (BAT4M)
- International Business Fundamentals (BBB4M)
- Introduction to Business Studies (BBI2O)
- Entrepreneurship: The Venture (BDI3C)
- Business Leadership: Management Fundamentals (BOH4M)
- Introduction to Information Technology (BTT101)
- Career Studies (GLC201)

About Toronto Financial International

Toronto Finance International (TFI) is a public-private partnership between Canada's largest financial services institutions, academic institutions and the government. Our organization is the lead voice for the international promotion of the Toronto Financial Centre and the global prominence of our financial services sector.

TFI also acts as a hub for Toronto's financial sector and works with our stakeholders on initiatives which drive the growth and competitiveness of the industry.

Our work spans from helping global financial services firms expand their operations in the Toronto Financial Centre, to working with the financial community, government and academia to foster a globally competitive sector which drives the economic growth of Canada.

TFI's Talent Initiatives

Talent is the engine that drives the Toronto Financial Centre, which employs almost 400,000 individuals, including a growing pool of technology professionals. As global competition intensifies, the ongoing ability to attract, develop and retain world-class talent remains critical to both existing and prospective financial services firms in the Toronto region. TFI works to grow and sustain our long-term talent advantage. We act as a connector - strengthening collaboration and building bridges between our partners. And we act as a catalyst - identifying and strategizing about today's talent challenges, and proposing and leading system-wide initiatives that reap benefits for the sector.

One of TFI's key Talent Initiatives is our High School Strategy to help younger students to uncover the breadth of interesting and innovative opportunities in financial services. These High School Curriculum Guides is an important component of that Strategy. We hope you will find them a useful and engaging tool, and welcome your feedback.

GLC201: Career Studies

LESSON: Financial Services Industry, Careers, Trends and Impacts

DURATION: 5 periods x 75 minutes

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Time Required: 375 minutes (5 periods x 75 minutes)

Description

This lesson enables students to learn about current career trends and impacts of the Financial Services industry. Students will learn about the wide range of careers available within the Financial Services industry using a Career Matching Tool to help identify areas of interest and supporting pathways.

This activity also allows students to collaborate using digital literacy tools and techniques to learn more about the Financial Services industry.

As the students assess and evaluate their areas of interest, they will research various careers and present a comprehensive profile of one career to the class.

Strands and Expectations

Strands

- Research career information for their portfolio
- Identify trends and impacts on society and the economy, in relation to work environments
- Evaluate websites for usefulness, accuracy and validity of research information

Overall Expectations

By the end of this course, students will:

- Use a research process to locate and select relevant career information from a variety of sources, for inclusion in their portfolio
- Identify a broad range of options for present and future learning, work, and community involvement
- Use appropriate decision-making and planning processes to set goals and develop a career plan

Specific Expectations

By the end of this course, students will:

- Demonstrate effective use of research skills to locate and select career-related information from a variety of sources (e.g., information interviews, print, video, and other computer-based resources)

- Use appropriate decision-making and planning processes to set goals and develop a career plan
- Supported by their research, describe selected occupations using identified criteria (e.g., education, training, skill requirements, duties, employment prospects, and knowledge and skills valued by the employer), and the ways in which secondary school students can prepare for these occupations
- Demonstrate an understanding of the decision-making process as it relates to career planning

Equity/Diversity and Social Justice (Teacher Actions)

The teacher will ensure that an environment of inclusiveness, fairness and equitable practice is used in terminology and language.

As per the socio-economic nature of this topic, the teacher should be mindful of their teaching practice and the impact of their language.

The teacher also needs to be mindful of how groups are chosen to ensure that representation from all 4 pathways (University, College, Apprenticeship and Workplace) are in each group.

Planning Notes

- Book the library/resource centre and the computer lab
- Make each student 1 (one) copy of each of the following:
 - Appendix 1.1: TFI Career Matching Tool Exploration Activity
 - Appendix 1.2: Career Presentation Assignment
 - Appendix 1.3: Presentation – Rubric
- Prepare Padlet or Exit Cards (Appendix 1.4)

Prior Knowledge Required

- Students need to have general knowledge of business and the Financial Services industry
- Students need a general understanding of skills, abilities and basic business functions
- Students utilize group-work skills, critical-thinking skills, and oral and written communication skills to complete this activity
- Students need to know the basic skills of using presentation software (e.g., PowerPoint, Prezi, Google slides) and how to conduct research on the Internet, including the use of a browser

Teaching and Learning Strategies

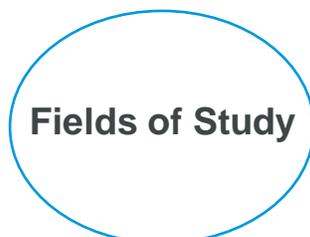
The following teaching and learning strategies comprise this lesson plan:

- Part 1: Minds On
- Part 2: Action
- Part 3: Consolidation

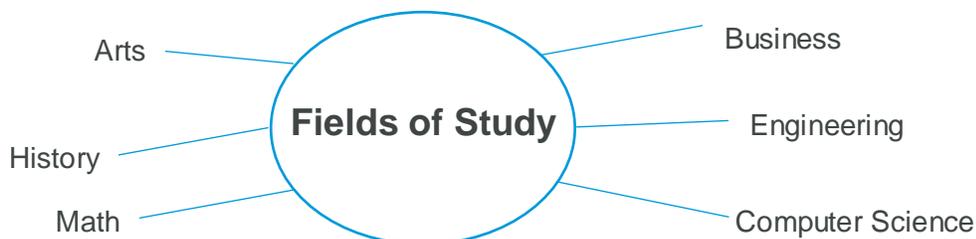
Part 1: Minds On (40 mins)

1. Before the lesson begins, set up the classroom as a conducive learning environment by:
 - Ensuring the library/resource centre and computer labs have been booked
 - Having the necessary handouts photocopied and ready for each student
 - Providing any necessary writing utensils for students
2. At the start of the lesson, welcome the students into the classroom.

On the board, draw a circle with the words “Fields of Study” inside or use the technology available in the classroom (e.g., a Document Camera or Smart Board) to project a diagram as shown below.



3. Ask students to come to the board and write a field of study using a line attached to the circle, as shown below.



Reflect and comment on the strong effort and positive start to the lesson.

4. Play the “What is Financial Services” video: <https://youtu.be/A1EqGgPnYIM>

This video will provide some background on the Financial Services industry and will help students to increase their participation in and contribution to the Financial Services Industry Mind Map.

5. Draw another circle on the board with the words “Financial Services” inside.

Ask students to come to the board and write as many careers they can think of that are related to the Financial Services industry. Suggestions include: accountant, human resources, lawyer, engineer, or customer service representative.

6. Ask the students to label which of the four pathways apply to the jobs that are listed on the board (as illustrated below).



7. Thank the students for listing the various pathways for the listed careers. Review the exercise and inform students that some of the careers don't necessarily start with university/college but may start with working before returning back to school to upgrade and build your career.

*As a tie into the Financial Literacy inclusion in the GLC201 Curriculum for Fall 2018, you may want to include the following segment from the TFI Video “Saving for the Future – Careers and Wealth Building”: <https://youtu.be/Pz8NCvdCP-w>

8. Ask the students to rate their interest level in each field from 1 to 10, with 1 representing a low interest and 10 representing a high interest. Inform students that they will be re-assessing and sharing their interest levels after the activity.

Part 2: Action (150 mins class work + 150 mins presentations)

1. After discussing the Financial Services industry and various pathways as a class, hand out the worksheet titled “TFI Career Matching Tool Exploration Activity” (Appendix 1.1).

Instruct students to work through the worksheet, highlighting that they will be completing the Career Matching Tool online and researching one of the careers they are matched with.

2. As students are completing the worksheet, the teacher should float around, inquire, and visually assess the students' knowledge, understanding and research skills.
3. (Note: Depending on the time available, per the GLC201 – Career Studies course content and expectations, you can include the below presentation assessment as part of the students Career Exploration and Digital Literacy course curriculum expectations and as a form of Formative Assessment.)

Instruct students to create a simple presentation using Google Slides or PowerPoint, detailing the information they just researched via the worksheet and supplementing with any other information required via Google.

Instruct students to include the following as part of their presentation:

- Introduce themselves
 - Which two careers they chose and why
 - For their selected careers, provide the following:
 - Key Role Dimensions
 - Focus Areas
 - Education, Skills, Experience
 - Education Credentials
 - Programs Offered
 - Related Roles
 - Future Trends and Impacts
 - Which post-secondary institution they would attend for this program, including grade/course requirements
 - Next Steps: how they plan to prepare for this pathway and career
4. Instruct each student to present their findings to the class, leaving time for a Q&A. Plan for class presentations to take 75 to 150 minutes.
5. Assessment:
- The Career Matching Tool can be assessed as a completion mark or diagnostic assessment based on the curriculum expectations
 - Appendix 1.3 Presentation – Rubric can be used to assess each student's presentation

Part 3: Consolidation (35 mins)

1. Before the lesson begins, visit www.Padlet.com and create a teacher account, if you do not already have one. Padlet enables teachers to post questions and invite students to post their responses, which are then available to the whole class to see.

You can use Padlet as a means to assess the students' understanding and application of knowledge learned during the lesson. Padlet can be used as a diagnostic assessment and as a completion mark for this lesson.

2. Input the following questions into the Padlet wall:
 - Q1 – Which career/job did you select?
 - Q2 – Based on your career, what skills would you need to acquire prior to starting?
 - Q3 – Compared to the start of this unit, has your interest in this field of study increased, stayed the same or decreased?
 - Q4 – What are your thoughts and reflections on this activity?

As an alternative to Padlet, teachers can use Exit Cards (Appendix 1.4) to assess the students' understanding and application of knowledge learned during the lesson. Exit Cards can be used as a diagnostic assessment and as a completion mark for this lesson.

1. Provide students with Exit Cards, prompting them answer the following questions:
 - Q1 – Which career/job did you select?
 - Q2 – Based on your career, what skills would you need to acquire prior to starting?
 - Q3 – Compared to the start of this unit, has your interest in this field of study increased, stayed the same or decreased?
 - Q4 – What are your thoughts and reflections on this activity?

Regardless of how the students' reflections are captured, the students' responses will be related to the careers, education and skills related to the TFI website. Some students may share their interest in various careers they did not know existed prior to this lesson.

Assessment/Evaluation Techniques

- Formative observation of communication and thinking skills during class discussions
- Formative assessment of written response
- Formative assessment of communication and skills during the presentation assignment
- Summative evaluation of presentation, using Appendix 1.3

Accommodations

- Assignment timelines can be adjusted to accommodate student needs
- English-Language Learners (ELLs) can develop their own literature glossaries that will span the unit
- Assign English-speaking peer partners to ESL/ELD students

Accommodations cont'd...

- Provide teacher or peer help in completing the research and development of their presentations
- Some students may require a model or scaffold technique to complete their final assignment, and parts of the assignment may require additional instructions to assist students of different abilities
- Reading materials may be adjusted to address the need for appropriate material for students with reading difficulties
- Provide copies of the definitions and notes to assist students who have difficulty taking notes during discussion or supplementing board notes
- Students will be provided a variety of case study choices and opportunities for expressing their knowledge and ideas

Resources

Internet

- TFI website:
www.explorefinancialservices.com
- TFI Career Matching Tool:
www.explorefinancialservices.com/my-career-matches/
- Conference Board of Canada - Financial Services Sector a Source of Capital and Growth for Canada's Economy:
www.conferenceboard.ca/press/newsrelease/16-11-24/Financial_Services_Sector_a_Source_of_Capital_and_Growth_for_Canada_s_Economy.aspx?
- The Globe and Mail - What Canada's financial industry fears in 2018:
www.theglobeandmail.com/report-on-business/rob-commentary/what-canadas-financial-industry-fears-in-2018/article37438278/
- The Insurance Institute of Canada - Why Insurance, Our Workforce:
www.career-connections.info/en/Why-Insurance/Industry-Workforce

Note: The URLs for websites were verified prior to publication. However, given the frequency with which these tend to change, teachers should verify websites before assigning them for student use.

Appendices

- Appendix 1.1: TFI Career Matching Tool Exploration Activity
- Appendix 1.2: Career Presentation Assignment
- Appendix 1.3: Presentation – Rubric
- Appendix 1.4: Exit Card

Date: _____

Teacher: _____

Name: _____

Completion Mark: /1

What is TFI?

Purpose/mandate:

What services does it provide?

Visit the TFI website: www.explorefinancialservices.com

Complete the TFI Career Matching Tool: www.explorefinancialservices.com/my-career-matches

Below, compile a list of 5-7 careers that you were matched with based on your responses to the Career Matching Tool.

Career/Job Title	Brief Description

Which two careers are the most interesting to you? Why?

1. _____:

2. _____:

Select one (1) of the careers and complete the following by conducting research on the TFI website:

Career:

Key Role Dimensions:

Focus Areas:

Education, Skills, Experience:

Program Offered:

Related Roles:

Future Trends and Impacts:

Visit www.explorefinancialservices.com/education/

Based on the education and pathways for the career you've chosen, explore the respective post-secondary institution and look for the requirements for entry into that respective program.

Post-Secondary Institution: _____

Grade 12 Requirements (marks, courses, any other expectations):

Financial Services Industry Trends, Impacts and Analysis

Answer the following questions:

Visit <https://tfi.ca/toronto-financial-centre/toronto-financial-centre>

1. Financial services are a critical component of the Canadian economy, accounting for more than _____ jobs and ____ % of Canadian GDP.
2. In Toronto, the Financial Services industry employed _____ people (directly & indirectly) and accounted for ____ % of Toronto's employment.
3. Within Canada's financial services sector, Toronto is the _____ largest financial centre in the country and accounts for a growing share of the sector.
4. The sector made up ____ % of Toronto's GDP.
5. Toronto's banking system is rated # ____ in the G7, with ____ of the world's largest banks.
6. The Toronto Stock Exchange is rated #1 globally for listings in _____ and _____. By number of listed companies, its North American rating is _____.

Visit:

- www.theglobeandmail.com/report-on-business/rob-commentary/what-canadas-financial-industry-fears-in-2018/article37438278/
- www.explorefinancialservices.com/in-demand-careers/

7. a) What is the #1 concern in the Financial Services industry?

b) Which career would be the best option for this concern?

8. a) What is the second biggest concern in the Financial Services industry?

b) There are many jobs and careers that would help ease this concern. What are they, based on the list?

Next Steps: As a Grade 10 student, what steps could you take this year to prepare for the career you've chosen?

As part of the Career Matching Tool Exploration Activity, create a simple presentation using Google Slides or PowerPoint using the information from your worksheet and any other information you need, sourced online.

Provide the information below in your presentation, with each point representing one slide:

- Introduce yourself
- Which two careers you chose and why
- For your selected careers, provide the following:
 - Key Role Dimensions
 - Focus Areas
 - Education, Skills, Experience
 - Education Credentials
 - Programs Offered
 - Related Roles
 - Future Trends and Impacts
- Which post-secondary institution you would attend for this program, including grade/course requirements
- Next Steps: how you plan to prepare for this pathway and career

You will be given class time to research your careers, complete the TFI Career Matching Tool Exploration Activity, and to create a presentation for the class. (2 class periods)

Category	Level 1	Level 2	Level 3	Level 4
Knowledge and Understanding				
summarize information gathered	summarizes information gathered using limited organization	summarizes information gathered using some organization	summarizes information gathered using considerable organization	summarizes information gathered using thorough organization
summarize research material	summarizes research material with limited clarity	summarizes research material with some clarity	summarizes research material with considerable clarity	summarizes research material with a high degree of clarity
Thinking				
analyze their understanding of their chosen career	analyzes their understanding with limited results	analyzes their understanding with some results	analyzes their understanding with good results	analyzes their understanding with excellent results
analyze the characteristics of their chosen career	analyzes the characteristics with assistance	analyzes the characteristics with some capability	analyzes the characteristics capably	analyzes the characteristics with expertise
Communication				
explain concept clearly	explains concept with limited clarity	explains concept with some clarity	explains concept with considerable clarity	explains concept with a high level of clarity
describe concept in an organized manner	description of concept demonstrates limited organization	description of concept demonstrates some organization	description of concept demonstrates considerable organization	description of concept demonstrates a high level of organization
Application				
evaluate information using supporting factual details	evaluates information using few supporting factual details	evaluates information using some supporting factual details	evaluates information using many supporting factual details	evaluates information using a wide range of supporting factual details

