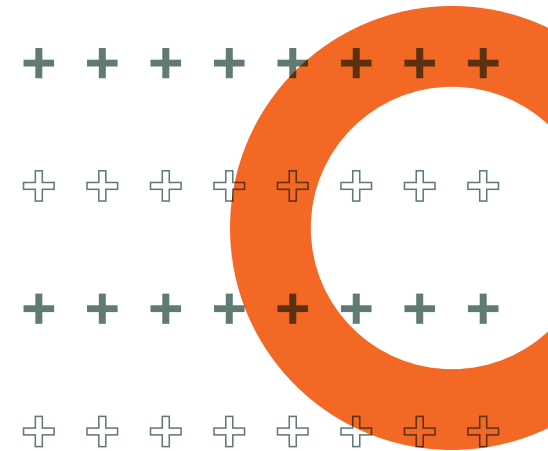
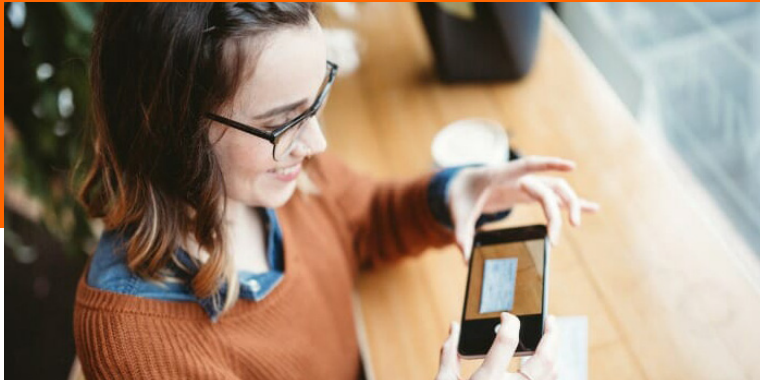


CAREER PATHWAYS AND COMPETENCY MAPS



FINANCE

**EDUCATION
WORK**

INDUSTRY-WIDE FOUNDATIONAL COMPETENCIES

Below, please find a list of top foundational competencies within the Finance Industry. Foundational competencies are defined as core competencies that provide a foundation for success in school and in the world of work. Nationally, employers have identified a link between foundational competencies and job performance and foundational competencies are often a prerequisite for workers to learn new industry-specific competencies. Foundational competencies are broken down into three categories as defined below:



FINANCE: INDUSTRY-WIDE FOUNDATIONAL COMPETENCIES

PERSONAL EFFECTIVENESS COMPETENCIES

These competencies are essential for all life roles such as being a member of a family, a community, and a larger society. These “soft skills” are increasingly valued in the labor market.

- ⓧ **Reliable**
- ⓧ **Integrity**
- ⓧ **Attention to Detail**
- ⓧ **Independence**
- ⓧ **Concern for Others**
- ⓧ **Cooperation**
- ⓧ **Self-Control**
- ⓧ **Initiative**
- ⓧ **Persistence**
- ⓧ **Analytical Thinking**
- ⓧ **Adaptability**
- ⓧ **Investigative**

EDUCATION COMPETENCIES

These are critical competencies primarily learned in an academic setting, as well as cognitive functions and thinking styles. These competencies are likely to apply to all organizations in a single industry or be represented by an industry association.

- ⓧ **Customer and Personal Service**
- ⓧ **Economics**
- ⓧ **Accounting**
- ⓧ **Mathematics**
- ⓧ **Computers/Software**
- ⓧ **Administration**
- ⓧ **Management**
- ⓧ **Personnel and Human Resources**
- ⓧ **Law and Government**
- ⓧ **Psychology**
- ⓧ **Communication**

WORKPLACE COMPETENCIES

These competencies represent the competencies and abilities that allow individuals to function in an organizational setting.

- ⓧ **Accuracy**
- ⓧ **Communication**
- ⓧ **Coordination**
- ⓧ **Problem Solving**
- ⓧ **Initiative**
- ⓧ **Teamwork**
- ⓧ **Accountability**
- ⓧ **Documentation and Record Keeping**
- ⓧ **Monitoring**
- ⓧ **Analysis**
- ⓧ **Speaking**
- ⓧ **Advising**
- ⓧ **Time Management**
- ⓧ **Understand expectations and standards**
- ⓧ **Confidentiality**

**JOB DESCRIPTION**

Interact with customers to provide basic or scripted information in response to routine inquiries about products and services. May handle and resolve general complaints. Excludes individuals whose duties are primarily installation, sales, repair, and technical support.

KEY FOUNDATIONAL COMPETENCIES

Confer, Confirm Transactions Occur, Contact Customers, Customer Transaction Recorder, Detail Oriented, Listening, Recommend, Refer to Another Department, Resolve, Review

TRANSFERABLE SKILLS

Communication, Customer Service, Conflict Resolution, Decision Making, Documenting, Interpreting Information, Obtain Information, Organize, Plan, Prioritize, Process Information, Record Information, Solution, Working with Computers, Working with People/Public

SALARY RANGE

Entry Level: \$45,000 - \$55,000

CREDENTIALS

Required:
HS Diploma

Varies by Employer:
HS Diploma/GED preferred
Valid Driver's License

WORK EXPERIENCE

Entry Level: 0-1 Years

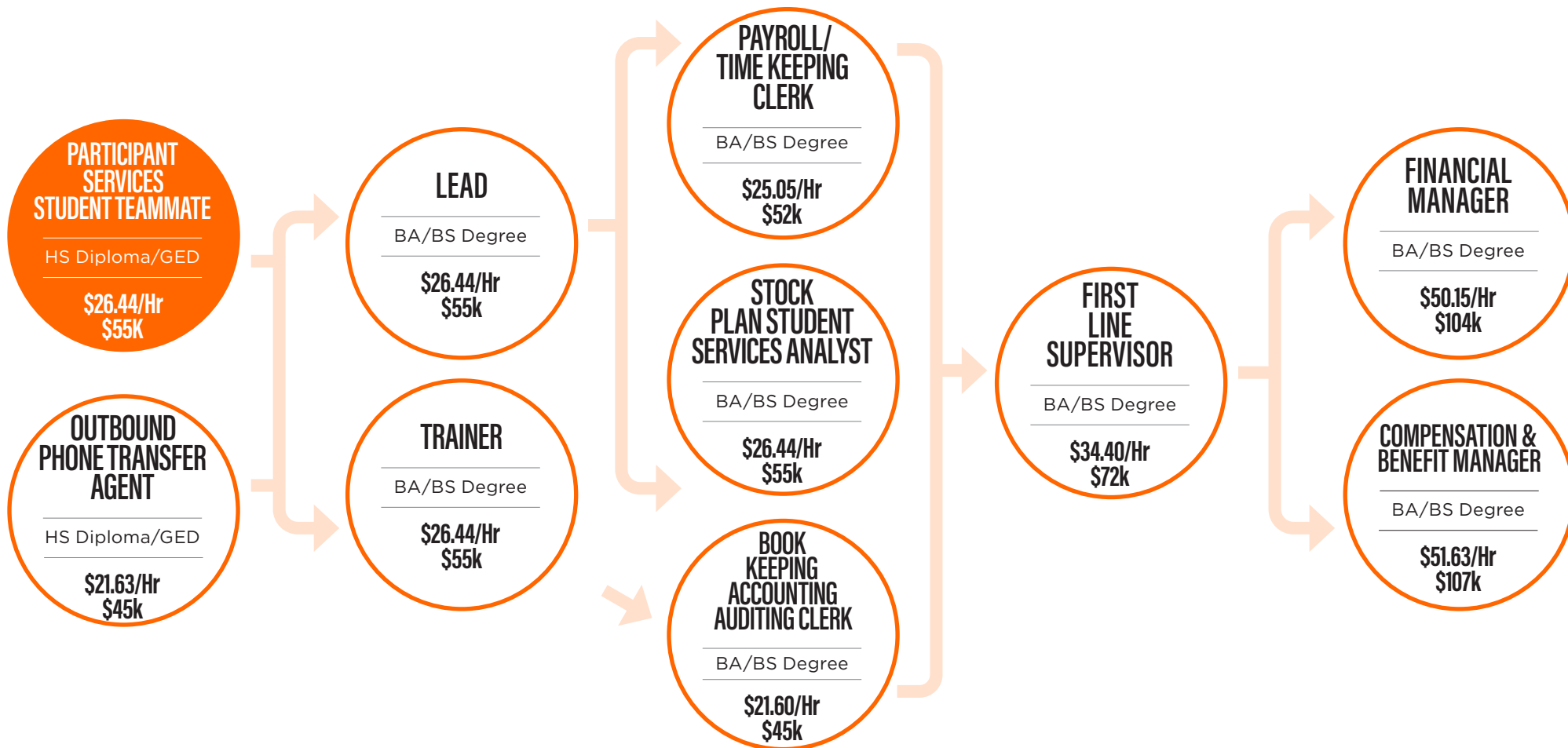
OTHER JOB TITLES/ROLES

Account Representative, Call Center Representative, Client Services Representative, Customer Care Representative (CCR), Customer Service Agent, Customer Service Representative (CSR), Customer Service Specialist, Customer Support Representative (Customer Support Rep), Guest Service Agent, Member Services Representative (Member Services Rep)



PARTICIPANT SERVICES STUDENT TEAMMATE PATHWAY

The pathway below represents a typical career pathway in the ever-changing industry of Finance. The highlighted circle represents the critical occupation.



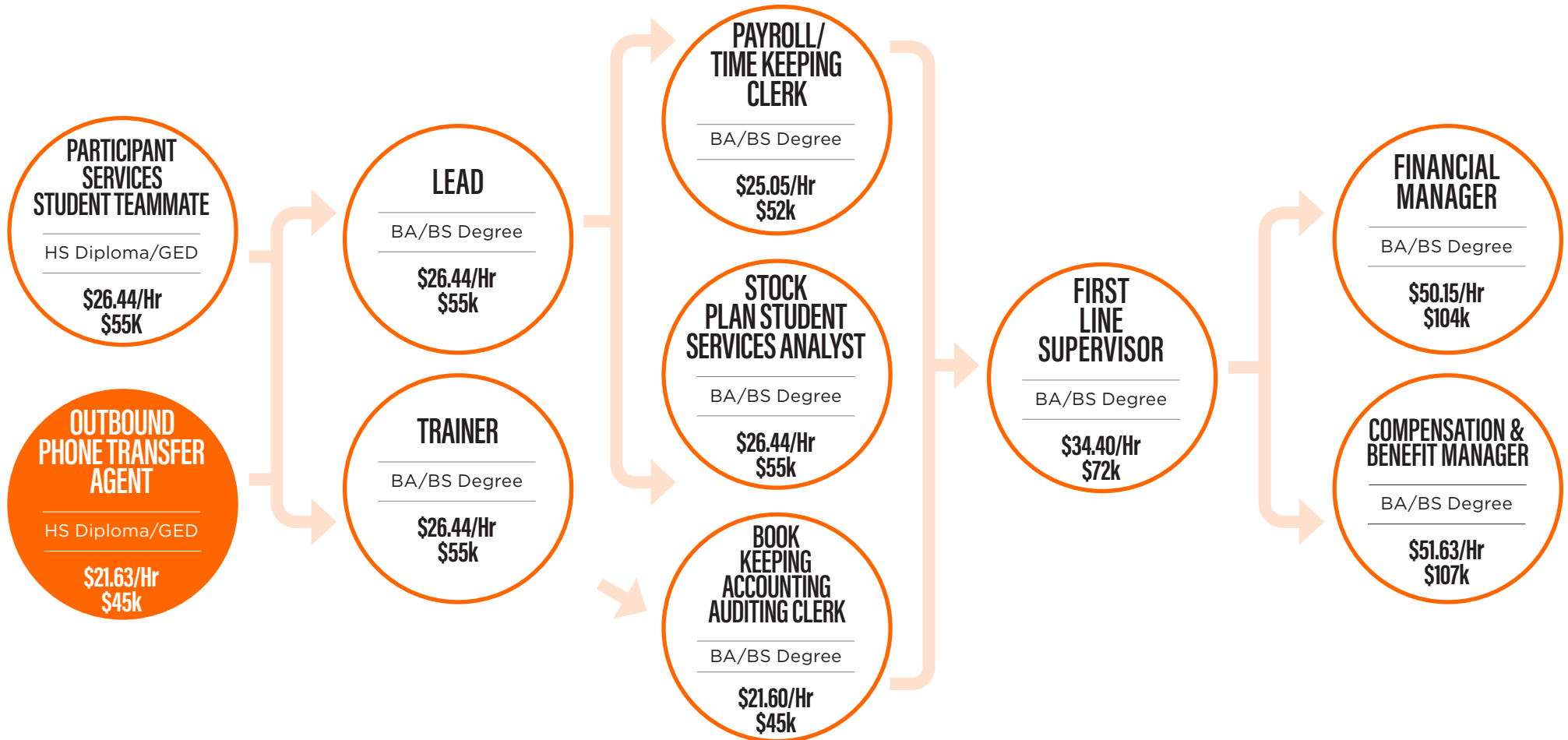


JOB DESCRIPTION	Attempt to get in contact with and to encourage Discover Card holders to speak with another member of the team to resolve their past due card balance.
KEY FOUNDATIONAL COMPETENCIES	Communication, Contact, Delivery, Document transactions, Explain, Obtain information, Maintain records, Scheduling
TRANSFERABLE SKILLS	Sales, Customer Service, Communications, Detail Oriented, Clerical work, Organizational Skills, Computer Skills, Management, Computer Literacy, Problem-Solving, Data Management/Integrity
SALARY RANGE	Entry Level: \$45,000
CREDENTIALS	Required: HS Diploma Varies by Employer: HS Diploma/GED Valid Driver's License
WORK EXPERIENCE	Entry Level: 0-1 Year
OTHER JOB TITLES/ROLES	Telemarketer, Telemarketing Sales Representative, Telephone Sales Representative (TSR), Telephone Service Representative (TSR), Telesales Representative, Telesales Specialist



OUTBOUND PHONE TRANSFER AGENT PATHWAY

The pathway below represents a typical career pathway in the ever-changing industry of Healthcare. The highlighted circle represents the critical occupation.





JOB DESCRIPTION

This role is responsible for providing a high level of support for both the contact center agents and the client, monitoring quality assurance daily, upskill training, and ensuring schedules and attendance are kept organized. This role is critical for ensuring that the agents are consistently motivated, well trained, effectively coached, and have high job performance in a technical environment.

KEY FOUNDATIONAL COMPETENCIES

Experience in handling customer escalations, Customer service to clients, Integrity and professionalism, Dealing with confidential information, Analytical and problem-solving skills, Written, Verbal, and interpersonal skills, Team leadership, Multitasking, Perform in a fast-paced environment

TRANSFERABLE SKILLS

Sales, Customer Service, Communications, Detail Oriented, Clerical Work, Organizational Skills, Computer skills, Management, Computer Literacy, Problem-solving, Data management/integrity

SALARY RANGE

Entry Level: \$47,000

CREDENTIALS

Required:
HS Diploma/GED
Varies by Employer:
Technical Certification
BA/BS degree

WORK EXPERIENCE

Entry Level: 1-3 Years

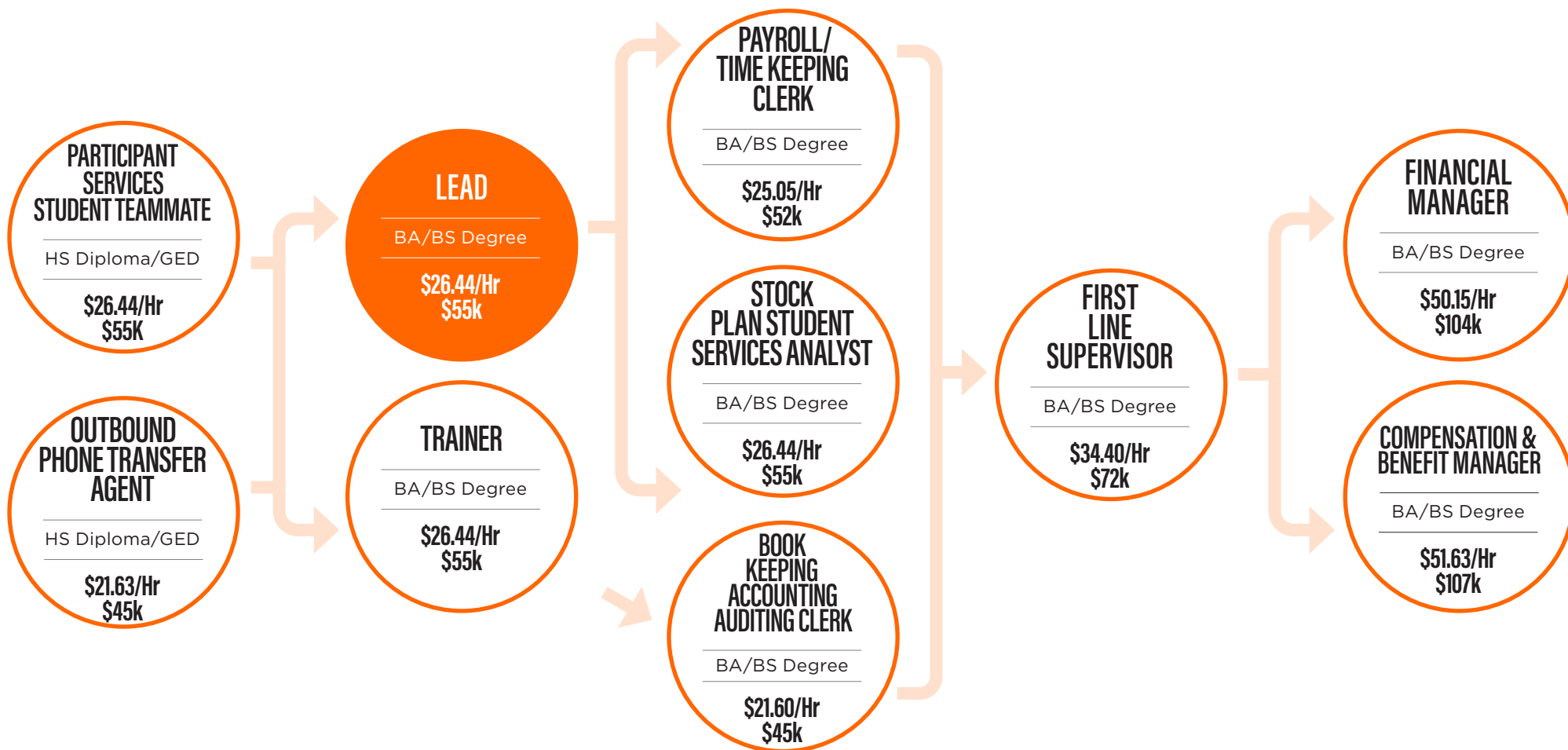
OTHER JOB TITLES/ROLES

Coordinator, Senior, Supervisor in Training



LEAD PATHWAY

The pathway below represents a typical career pathway in the ever-changing industry of Finance. The highlighted circle represents the critical occupation.



**JOB DESCRIPTION**

Design or conduct work-related training and development programs to improve individual skills or organizational performance. May analyze organizational training needs or evaluate training effectiveness.

KEY FOUNDATIONAL COMPETENCIES

Knowledge of education and training principles, Customer service, Personnel and human services, Administration and management

TRANSFERABLE SKILLS

Instructing, Speaking, Learning Strategies, Active Listening, Social Perceptiveness

SALARY RANGE

Entry Level: \$47,000

CREDENTIALS

Required:
HS Diploma/GED

Varies by Employer:
BA/BS Degree

WORK EXPERIENCE

Entry Level: 1-3 Years

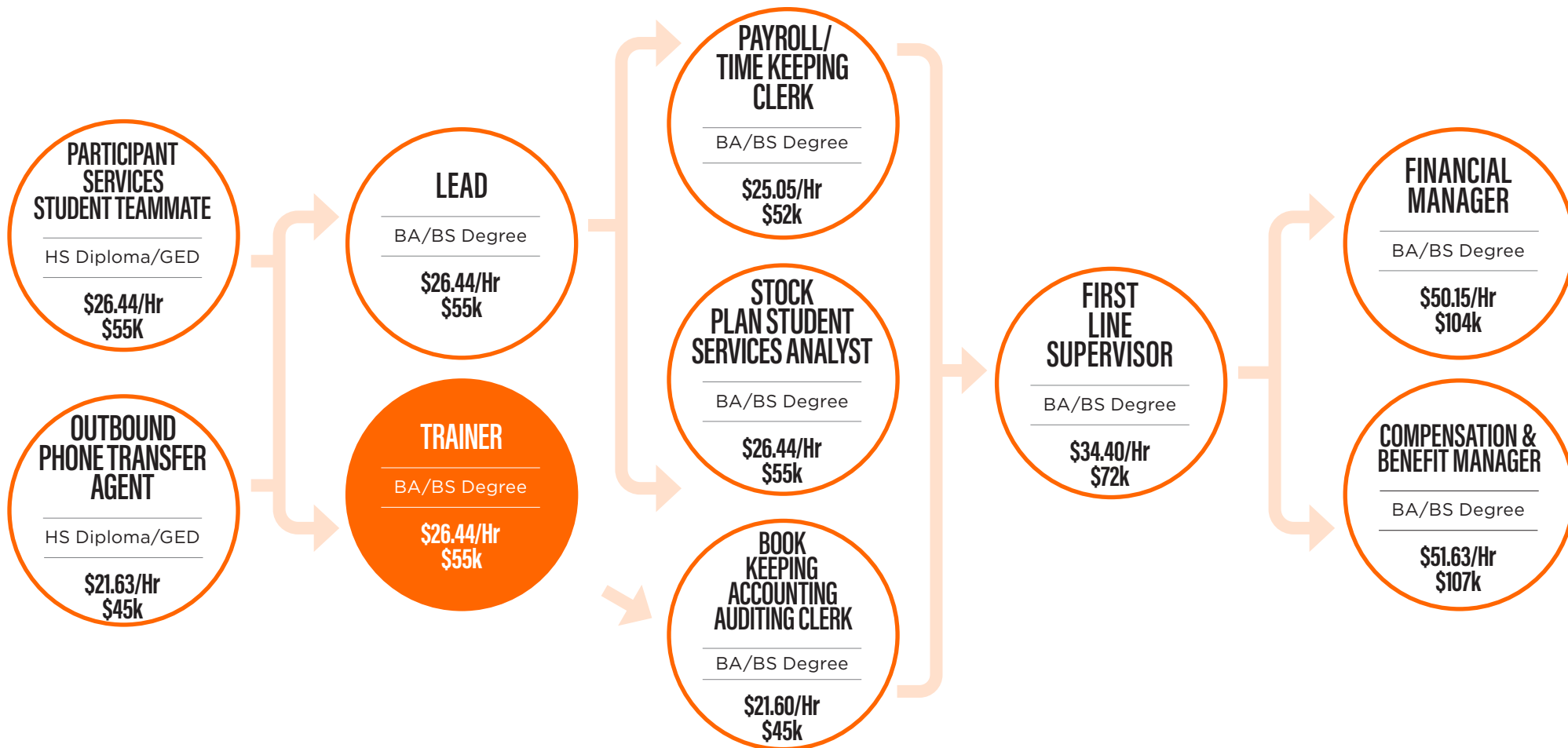
OTHER JOB TITLES/ROLES

Computer Training Specialist, Corporate Trainer, Job Training Specialist, Leadership Development Specialist, Learning and Development Consultant, Learning and Development Specialist (L and D Specialist), Management Development Specialist, Trainer, Training and Development Consultant, Training Specialist



TRAINER PATHWAY

The pathway below represents a typical career pathway in the ever-changing industry of Finance. The highlighted circle represents the critical occupation.



**JOB DESCRIPTION**

Compile and record employee time and payroll data. May compute employees' time worked, production, and commission. May compute and post wages and deductions, or prepare paychecks.

KEY FOUNDATIONAL COMPETENCIES

Payroll processing, Accounting, Auditing, Payroll systems, Finance, Payroll tax, Payroll reporting, Wage garnishment

TRANSFERABLE SKILLS

Data Entry, Reconciliation, General Ledger, Human Resources Information System (HRIS), Kronos (Timekeeping Software), Invoicing, Process Improvement

SALARY RANGE

Entry Level: \$47,611

Advanced Level: \$71,511

CREDENTIALS

Required:
HS Diploma or GED

Varies by Employer:
BA or BS Degree

WORK EXPERIENCE

Entry Level: 1-3 Years

Advanced Level: 3-5 Years

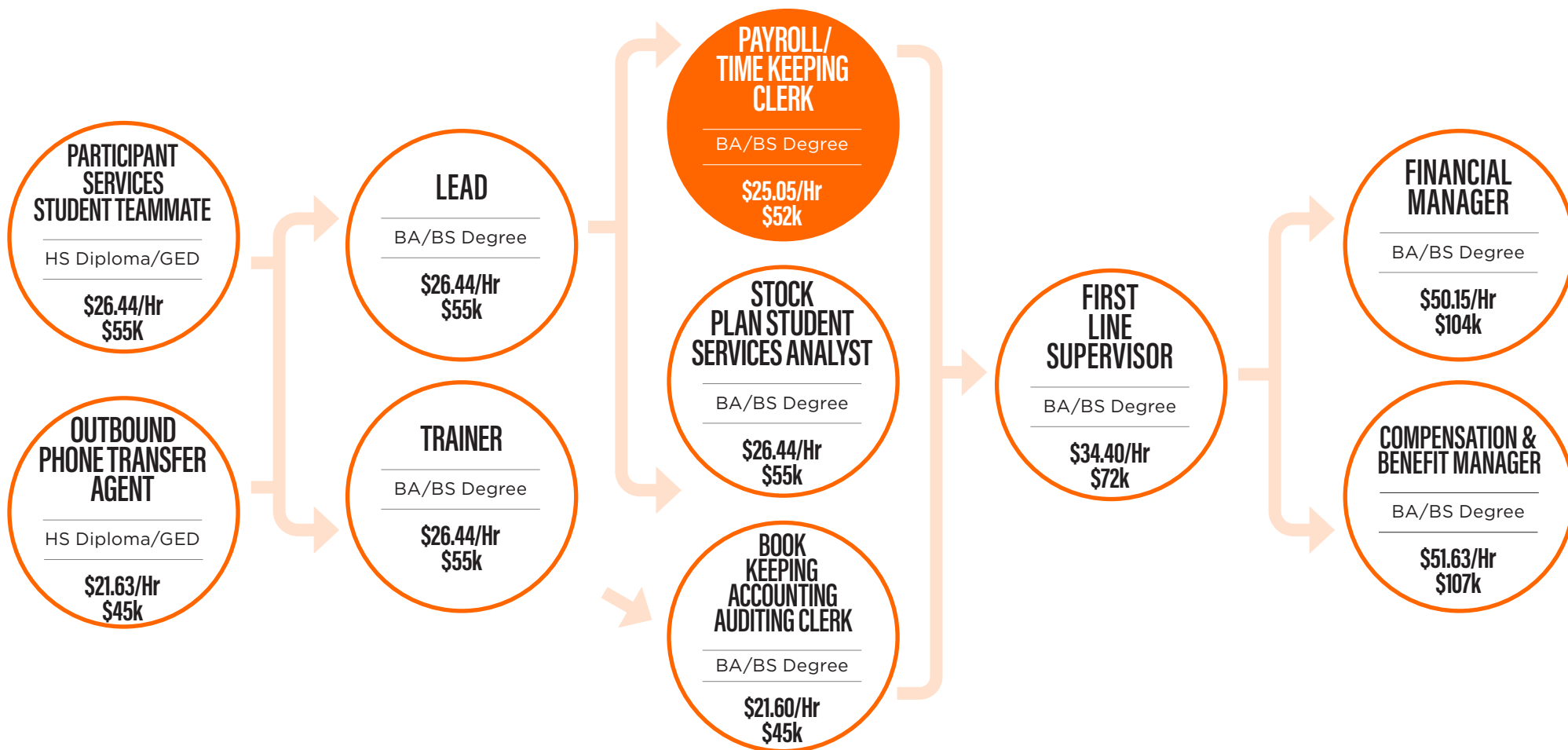
OTHER JOB TITLES/ROLES

Payroll Specialists, Payroll Administrators, Payroll Clerks, Payroll Coordinators, Payroll Analysts



PAYROLL/TIMEKEEPING CLERK PATHWAY

The pathway below represents a typical career pathway in the ever-changing industry of Finance. The highlighted circle represents the critical occupation.



**JOB DESCRIPTION**

The Investments Stock Plan Services (SPS) Analyst supports the senior SPS staff with research, data analysis, and audit processing. The study is the basis for critical business insights, such as forecasting, predictive modeling, and statistical and data analysis. This role operates in a fast-paced, self-directed team environment subject to high levels of internal and external audit research, data analysis, and audit processing. Primary role is to diagnose factors impacting business.

KEY FOUNDATIONAL COMPETENCIES

Accounting, Advise, Analyze, Assess, Auditing, Collaborate, Confer, Develop relationships, Evaluate, Finance, Interpret, Listening, Monitor, Prepare, Present, Recommend

TRANSFERABLE SKILLS

Budgeting, Communication, Detail Oriented, Forecasting, Microsoft Excel, Planning, Problem Solving

SALARY RANGE

Entry Level: \$45,000 - \$55,000

CREDENTIALS

Required:
BA/BS Degree

WORK EXPERIENCE

Entry Level: 1-3 Years

Advanced Level: 3-5 Years

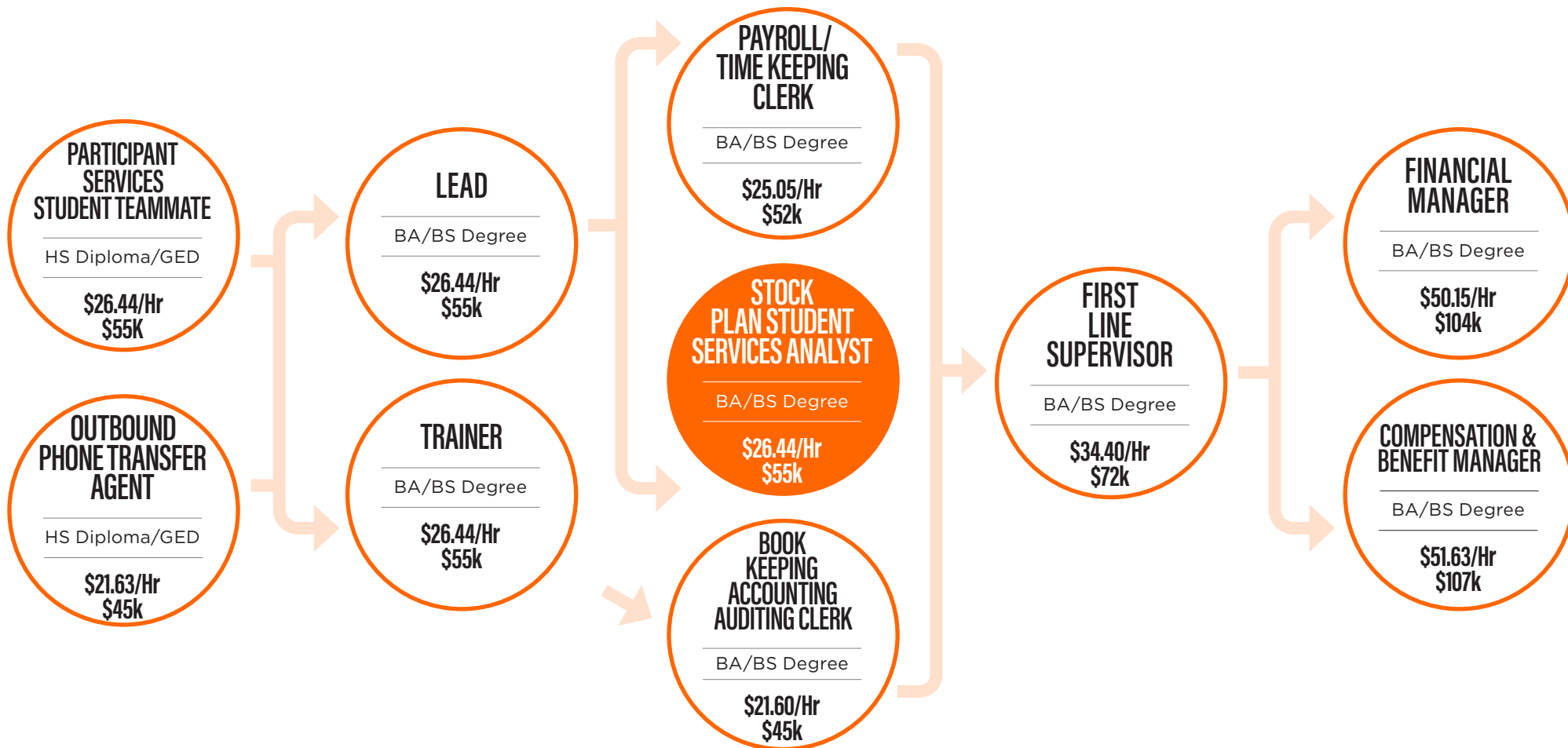
OTHER JOB TITLES/ROLES

Analyst, Credit Products Officer, Equity Research Analyst, Financial Analyst, Investment Analyst, Planning Analyst, Portfolio Manager, Real Estate Analyst, Securities Analyst, Trust Officer



STOCK PLAN STUDENT SERVICES ANALYST PATHWAY

The pathway below represents a typical career pathway in the ever-changing industry of Finance. The highlighted circle represents the critical occupation.



**JOB DESCRIPTION**

Compute, classify, and record numerical data to keep financial records complete. Perform any combination of routine calculating, posting, and verifying duties to obtain primary financial data for use in maintaining accounting records. May also check the accuracy of figures, calculations, and postings pertaining to business transactions recorded by other workers.

KEY FOUNDATIONAL COMPETENCIES

Software in the following areas: Accounting, Cloud based data access and sharing, Data base interface and query, Enterprise resource planning, and financial analysis. Basic understanding of economics.

TRANSFERABLE SKILLS

Reading Comprehension, Time Management, Written and Verbal Communication, Active Listening, Critical Thinking, Mathematics

SALARY RANGE

Entry Level: \$20,000-\$46,000

Advanced Level: \$46,000-\$65,000

CREDENTIALS

Required:
BA/BS Degree

WORK EXPERIENCE

Entry Level: 1-3 Years

Advanced Level: 3-5 Years

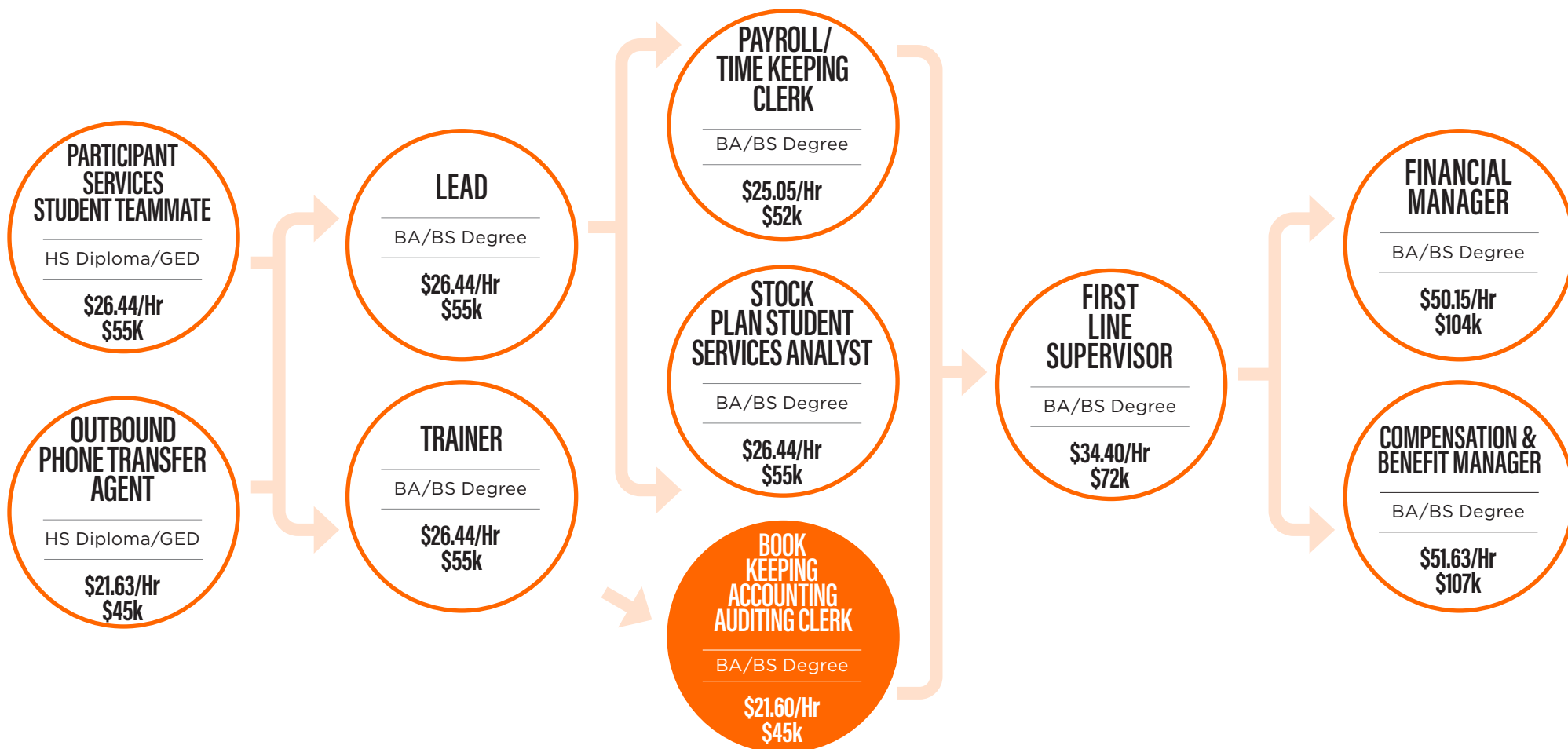
OTHER JOB TITLES/ROLES

Account Clerk, Accounting Assistant, Accounting Associate, Accounting Clerk, Accounting Specialist, Accounting Technician, Accounts Payable Clerk, Accounts Payable Specialist, Accounts Payables Clerk, Accounts Receivable Clerk



BOOKKEEPING/ACCOUNTING/AUDITING CLERK PATHWAY

The pathway below represents a typical career pathway in the ever-changing industry of Finance. The highlighted circle represents the critical occupation.



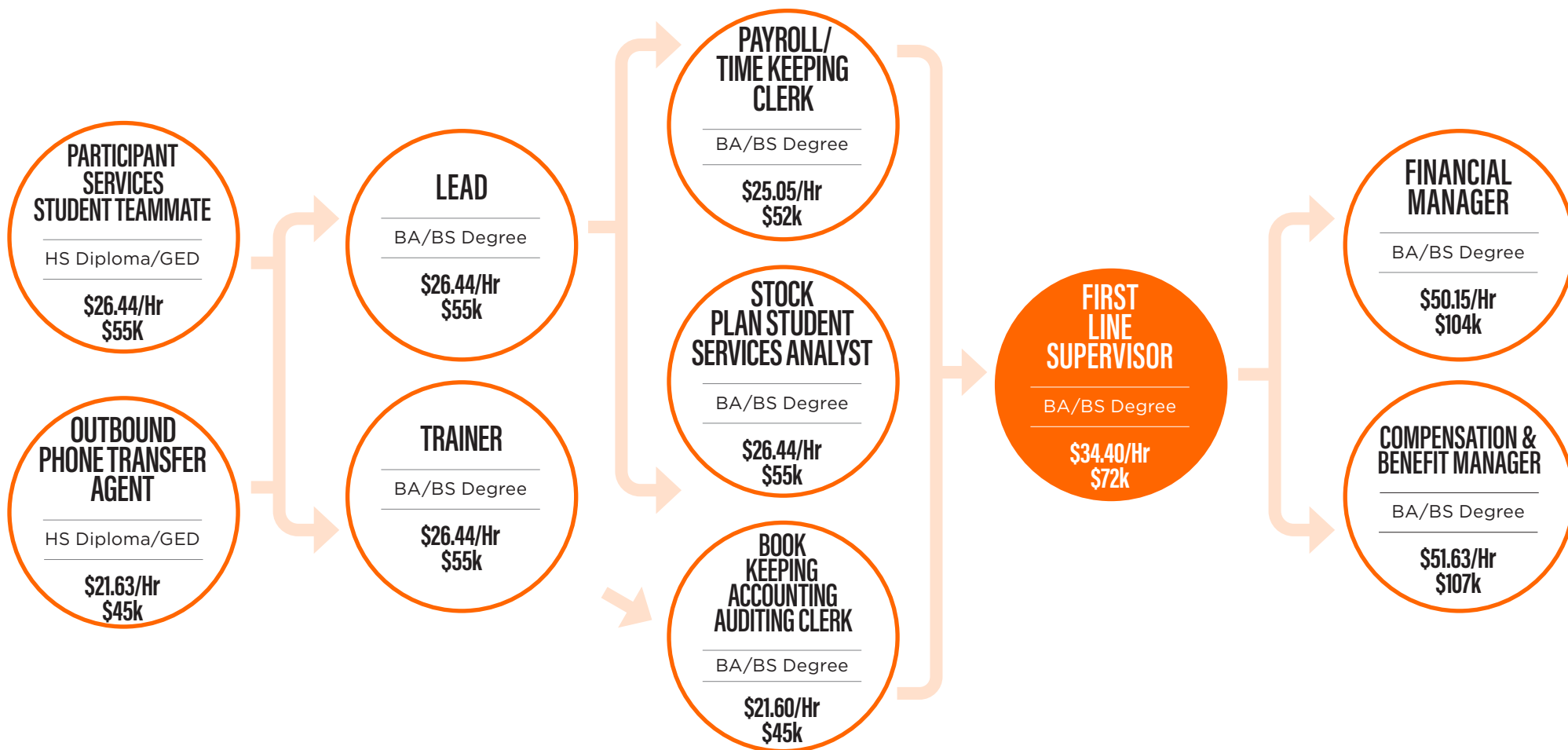


JOB DESCRIPTION	Directly supervise and coordinate activities of workers. May perform duties such as budgeting, accounting, and personnel work, in addition to supervisory duties.	
KEY FOUNDATIONAL COMPETENCIES	Customer and personal service, Coordination, Monitoring, Management of personal services, Written and verbal communication, Economic and accounting, Personnel and human resources	
TRANSFERABLE SKILLS	Interpersonal Relationships, Empathy, Patience, Teaching Others	
SALARY RANGE	Entry Level: \$45,000-\$60,000	Advanced Level: \$60,000-\$85,000
CREDENTIALS	Required: HS Diploma or GED Varies by Employer: BA or BS Degree	
WORK EXPERIENCE	Entry Level: 1-3 Years	Advanced Level: 3-5 Years
OTHER JOB TITLES/ROLES	Customer Service Department Supervisor, Customer Service Supervisor, Driver Sales Supervisor, Information Center Supervisor, Inside Sales Supervisor, Reservations Supervisor, Sales Department Supervisor, Sales Leader, Sales Supervisor, Sales Team Leader	



FIRST LINE SUPERVISOR PATHWAY

The pathway below represents a typical career pathway in the ever-changing industry of Finance. The highlighted circle represents the critical occupation.





FINANCE

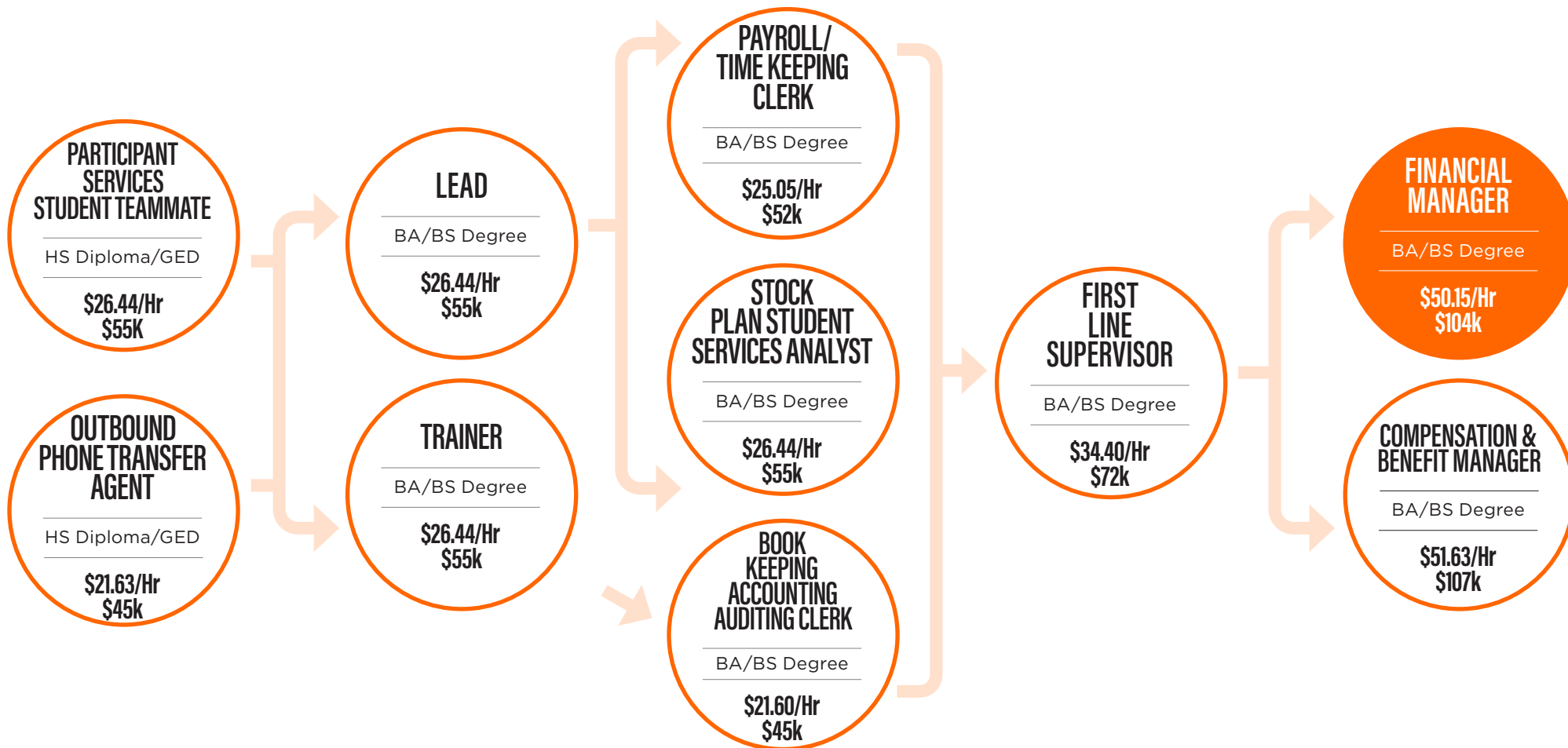
FINANCIAL MANAGER

JOB DESCRIPTION	Plan, direct, or coordinate accounting, investing, banking, insurance, securities, and other financial activities of a branch, office, or department of an establishment.	
KEY FOUNDATIONAL COMPETENCIES	Accounting, Finance, Financial statements, Auditing, Generally accepted accounting principles, Internal controls, Financial analysis, General ledger	
TRANSFERABLE SKILLS	Accounts Payable, Financial Services, Accounts Receivable, Process Improvement, Project Management, Loans, Marketing, Billing, Reconciliation, Cost Accounting	
SALARY RANGE	Entry Level: \$80,000 - \$104,000	Advanced Level: \$104,000 - \$140,000
CREDENTIALS	Required: HS Diploma/GED Varies by Employer: Bachelor's Degree or Master's Degree	
WORK EXPERIENCE	Entry Level: 1-3 Years	Advanced Level: 3-5 Years
OTHER JOB TITLES/ROLES	Accounting Supervisor, Banking Center Manager (BCM), Branch Manager, Business Banking Manager, Credit Administration Manager, Credit Manager, Financial Center Manager, Financial Planning Manager, Financial Reporting Manager, Financial Systems Manager	



FINANCIAL MANAGER PATHWAY

The pathway below represents a typical career pathway in the ever-changing industry of Finance. The highlighted circle represents the critical occupation.



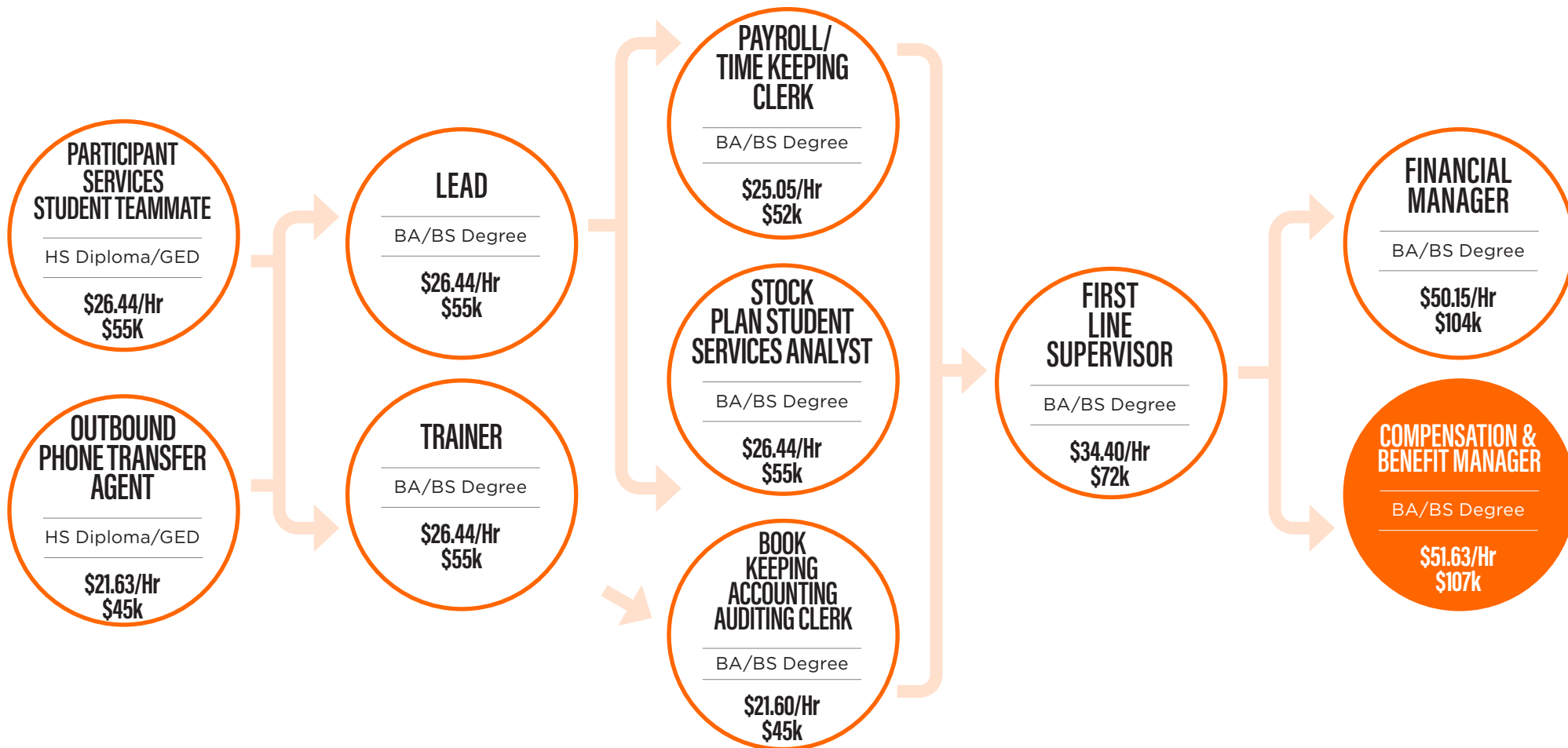


JOB DESCRIPTION	Plan, direct, or coordinate compensation and benefits activities of an organization.	
KEY FOUNDATIONAL COMPETENCIES	Finance, Auditing, Compensation strategy	
TRANSFERABLE SKILLS	Project Management, Human Resources Information System (HRIS), Accounting, Benefits Administration, Marketing, Benefits Enrollment Processes, Billing, Process Improvement, Data Analysis	
SALARY RANGE	Entry Level: \$80,000 - \$110,000	Advanced Level: \$110,000-\$218,000
CREDENTIALS	Required: Bachelor's degree Varies by Employer: Master's degree	
WORK EXPERIENCE	Entry Level: 1-3 Years	Advanced Level: 3-5 Years
OTHER JOB TITLES/ROLES	Benefits Coordinator, Benefits Manager, Compensation and Benefits Manager, Compensation Director, Compensation Manager, Employee Benefits Coordinator, Employee Benefits Director, Employee Benefits Manager, Payroll Manager	



COMPENSATION AND BENEFIT MANAGER PATHWAY

The pathway below represents a typical career pathway in the ever-changing industry of Finance. The highlighted circle represents the critical occupation.



ABOUT EDUCATION AT WORK

Education at Work (EAW) is a nonprofit organization with a critical mission. We help students pay for college, acquire valuable work skills, and build career connections. We bring students, universities, and employers together to build a stronger workforce by empowering students with the confidence and early career skills they need to be successful in the future. EAW partners with Fortune 500 companies to provide college students with resume-worthy work experience in a professional environment as we bridge the gap between what students learn and what employers need. Our students receive an hourly wage, tuition assistance, and professional coaching along with a flexible work schedule. Our goal is that EAW students graduate with less debt and the established experience needed to move into a full-time position in an industry they will thrive in. Learn more at educationatwork.org and stradacollaborative.org.



ABOUT THE COUNCIL FOR ADULT AND EXPERIENTIAL LEARNING

Recognizing that adult learners are the backbone of the U.S. economy, CAEL helps forge a clear, viable connection between education and career success, providing solutions that promote sustainable and equitable economic growth. CAEL opens doors to opportunity in collaboration with workforce and economic developers; postsecondary educators; employers and industry groups; foundations and other mission-aligned organizations. By engaging with these stakeholders, we foster a culture of innovative, lifelong learning that helps individuals and their communities thrive. A membership organization established in 1974, CAEL is a part of Strada Collaborative, a mission-driven nonprofit. Learn more at cael.org and stradacollaborative.org.



EDUCATION
WORK