



## Module: Finance - Complete

**Sku:** PC314

**Horas:** 60

### OBJETIVOS

The student will start with fundamental English terminology for the banking and financial sector. Students will also become familiar with customer service terms, advertising, general business terms, financial and everyday business expressions. Each term is defined and used in context in sentences. This level is comprised of a series of interactive exercises such as listening comprehension with short, realistic dialogue, answering questions, and submitting email exercises.

Then, the learner will consolidate the material from the previous blocks and begin the transition from basic to intermediate. Students will become familiar with banking and financial terminology including accounting. Each term is defined and used in context in sentences. This level is comprised of a series of interactive exercises such as listening comprehension with short, realistic dialogue, answering questions, and submitting email exercises.

Finally, the learner will consolidate the acquired knowledge and begin the transition from intermediate to advanced. Students will become familiar with banking and financial terminology including investments. Each term is defined and used in context in sentences. This level is comprised of a series of interactive exercises such as listening comprehension with short, realistic dialogue, answering questions, and submitting email exercises.

### CONTENIDOS

#### Module: Finance - Complete 1/5

Financial services: Basic banking terms and finance (EASY)

In this block, students will be introduced to basic banking and financial language. Vocabulary included – bank draft, asset, debt, credit, budget, interest. They will listen to a short, realistic dialogue of a bank teller opening up an account. The learner will work their freeform speaking by answering questions related to an account opening at the bank. At the end of the module, the student will answer, in writing and orally, questions from the tutor to be sent by email.

Financial vocabulary

Students will be studying basic banking and financial vocabulary. Vocabulary includes- audit, debt, credit card, foreclosure, estate account and much more. It is presented in context in

sentences and definitions are provided for each term or expression. Students can practice their speaking, and at the same time learning what each term means and add to their ability to carry out essential financial tasks in English.

#### Typical situation - Opening an account

In this lesson students will practice their understanding and comprehension by listening and following along with a typical real life situation in a financial environment. We will be listening to a typical situation of opening a bank account with a customer.

#### Dialogue - At the bank

The student develops their freeform speaking by answering questions that are asked related to finance. In this lesson we will be looking at questions asked to a client when a bank account is opened.

#### Writing and speaking lab

In this section the student will answer the spoken questions the tutor has prepared and plan and write an email following the tutor's written instructions. Students will match 10 verbs with nouns and speak about their job. The tutor will give feedback on this work.

#### Customer Service: Suggestions, inquiries and complaints (EASY)

In this block, students will be introduced to basic customer service terms. Vocabulary included – Contract, deliver, customer service representative, image, policy. They will listen to a short, realistic dialogue of customer service representative on the phone with a customer problem. The learner will work their freeform speaking by answering questions related to dealing with customer service issues. At the end of the module, the student will answer, in writing and orally, questions from the tutor to be sent by email.

#### Financial vocabulary

Students will be studying basic customer service vocabulary. The student will be introduced to typical vocabulary used in this area. Some vocabulary in this first lesson includes – image, to greet, contract, vision, solution and to listen. It is presented in context in sentences and definitions are provided for each term or expression. Students can practice their speaking and at the same time learn what each term means.

#### Typical situation - Customer calling with a problem

In this lesson students will practice their understanding and comprehension by listening and following along with a typical real life situation in a customer service environment. We will be listening to a telephone conversation between a customer who is experiencing an issue with his computer and a customer service representative.

#### Dialogue - Customer problems

The student develops their freeform speaking by answering questions that are proposed related to customer service. In this lesson we will be looking at questions asked by a customer service representative to a customer with a computer problem.

#### Writing and speaking lab

In this section the student will answer the spoken questions the tutor has prepared and plan and write an email following the tutor's written instructions. Students will write 6 sentences

using could-would-should and speak about conflict resolution and customer service experiences. The tutor will give feedback on this work.

## **Module: General Business – Advertising, Business Expressions (EASY)**

### **Introduction**

In this block, students will be introduced to general business terms and expressions related to advertising.

Vocabulary included: buzzword, cutthroat, embargo, loophole.

They will listen to a short, realistic dialogue of a business call between a client and an administrative assistant. The learner will work on their freeform speaking by answering questions related to handling a business call.

At the end of the module, the student will answer, in writing and orally, questions from the tutor to be sent by email.

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### **Financial Vocabulary**

Students will be studying basic business vocabulary and expressions. In this first business lesson, vocabulary will include:

- innovation
- loophole
- risks
- embargo
- downsize

Vocabulary is presented in context through sentences, and definitions are provided for each term or expression. Students can practice their speaking while learning the meanings of each term, enhancing their ability to perform essential business communication tasks in English.

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### **Typical Situation – Calling Someone's Office**

In this lesson, students will develop their listening comprehension by following a typical phone call received by an administrative assistant.

Objective: Understand the flow of a common business call and identify key vocabulary and expressions.

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### **Dialogue – Answering a Business Call**

The student works on their freeform speaking by answering proposed questions related to general business topics.

This lesson focuses on studying what to ask and the general vocabulary used when receiving and answering a business call.

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## Writing and Speaking Lab

In this section:

- The student will answer spoken questions prepared by the tutor.
- The student will plan and write an email based on the tutor's written instructions.
- The student will explain four common business expressions.
- The student will create a small dialogue between a secretary and a caller.

The tutor will give feedback on this work.

### **Module: Financial Services – Basic Banking Terms and Finance (MEDIUM)**

#### Introduction

In this block, students will consolidate previous banking and financial terminology and be introduced to intermediate vocabulary related to mortgage and accounting.

Vocabulary included: factoring, embezzlement, debenture, closing costs, arbitrage.

They will listen to a short, realistic dialogue of an interview at a large company with a human resources manager interviewing for a new accountant. The learner will work on their freeform speaking by answering questions from a bank representative regarding mortgage procedures.

At the end of the module, the student will answer, in writing and orally, questions from the tutor to be sent by email.

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#### Financial Vocabulary

Students will be studying intermediate banking and financial vocabulary. Vocabulary includes:

- arbitration
- commitment fee
- collateral
- financial capital
- garnishment
- principal
- sub-prime

These terms are presented in context through sentences, and definitions are provided for each term or expression. Students can practice their speaking while learning the meanings of each term. Vocabulary spans business, banking, and accounting terminology.

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#### Typical Situation – Hiring a New Accountant

In this lesson, students will develop their understanding and listening comprehension by following a typical interview process for a new accountant.

Objective: Identify relevant vocabulary and structure in a hiring interview scenario.

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### Dialogue – Getting a Mortgage

Students will practice their freeform speaking skills by answering questions typically asked by a mortgage representative.

Objective: Reinforce understanding of mortgage-related vocabulary and practice realistic customer-representative dialogues.

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### Writing and Speaking Lab

In this section:

- The student will answer spoken questions prepared by the tutor.
- The student will plan and write an email following the tutor's written instructions.
- The student will explain three types of mortgages.
- The student will speak about an internet article about banks.

The tutor will give feedback on this work.

### **Module: Customer Service – Suggestions, Inquiries and Complaints (MEDIUM)**

#### Introduction

In this block, students will consolidate previous customer service terminology and be introduced to intermediate vocabulary in this field.

Vocabulary included: empathy, feedback, inconvenience, netiquette, service partners.

Students will listen to a short, realistic dialogue of soliciting for new business and providing service at a trade show. The learner will work on their freeform speaking by answering questions related to customer service when checking into a hotel.

At the end of the module, the student will answer, in writing and orally, questions from the tutor to be sent by email.

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#### Customer Service Vocabulary

Students will study intermediate customer service vocabulary, building on previously learned terms. New vocabulary includes:

- helpline
- product return
- clarification
- expert

These terms are presented in context through sentences, and definitions are provided for each term or expression. Students can practice their speaking while learning the meanings of each term.

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### Typical Situation – Gaining New Business

In this lesson, students will practice their understanding and listening comprehension by following a typical real-life situation in a customer service environment.

Objective: Understand vocabulary and interaction in a trade show setting to gain new business.

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### Dialogue – Checking into a Hotel

Students will practice their freeform speaking skills by answering questions typically asked by a desk clerk during the check-in process at a hotel.

Objective: Reinforce practical customer service vocabulary in hospitality-related scenarios.

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### Writing and Speaking Lab

In this section:

- The student will answer spoken questions prepared by the tutor.
- The student will plan and write an email following the tutor's written instructions.
- The student will write a short conversation at a restaurant.
- The student will speak about customer service in banking.

The tutor will give feedback on this work.

### **Module: General Business – Advertising, Business Expressions (MEDIUM)**

#### Introduction

In this block, students will consolidate previous business terminology and expressions and be introduced to intermediate vocabulary in business situations.

Vocabulary and expressions included: kiting, moral hazard, give lip service, middleman, pass the buck, property tax, venture capital.

Students will listen to a short, realistic dialogue of two people working in a shipping and receiving department discussing logistic issues. The learner will work on their freeform speaking by answering questions related to meeting someone at a business conference.

At the end of the module, the student will answer, in writing and orally, questions from the tutor to be sent by email.

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#### Business Vocabulary

Students will study intermediate business vocabulary. Some of the vocabulary terms covered include:

- mergers
  - phishing
  - Ponzi scheme
  - indemnity
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- insurance

These terms are presented in context through sentences, and definitions are provided for each term or expression. Students can practice their speaking while learning the meanings of each term.

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#### Typical Situation – Shipping and Deliveries

In this lesson, students will practice their understanding and listening comprehension by following a typical real-life situation in a logistics department.

Objective: Understand interactions and vocabulary related to receiving and managing orders.

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#### Dialogue – Meeting Someone at a Business Conference

Students will practice their freeform speaking skills by answering questions when meeting new contacts in a business conference setting.

Objective: Reinforce social and professional interaction skills in a business environment.

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#### Writing and Speaking Lab

In this section:

- The student will answer spoken questions prepared by the tutor.
- The student will plan and write an email following the tutor's written instructions.
- The student will explain common business expressions.
- The student will speak about social media and advertising.

The tutor will give feedback on this work.

### **Module: Financial Services – Basic Banking Terms and Finance (ADVANCED)**

#### Introduction

In this block, students will consolidate previous banking and financial terminology and be introduced to advanced vocabulary related to financial planning and investment.

Vocabulary included: financial intermediaries, point, narrow money, proxy, underwriting, short selling, bull market, capital gain.

Students will listen to a short, realistic dialogue of meeting a colleague at an investment conference. The learner will work on their freeform speaking by answering questions related to investing and hiring an investment advisor.

At the end of the module, the student will answer, in writing and orally, questions from the tutor to be sent by email.

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#### Financial Vocabulary

Students will study advanced banking and financial terms and expressions. Building on the

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previous two financial sections, this module includes vocabulary such as:

- commodity
- balanced fund
- par value
- sales load
- financial planning

These terms are presented in context through sentences, and definitions are provided for each term or expression. Students can practice their speaking while learning the meanings of each term.

Vocabulary scope: banking, finance, and investment.

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#### Typical Situation – Meeting at an Investment Conference

In this lesson, students will practice their understanding and listening comprehension by following a typical real-life situation of two colleagues meeting at an investing conference.

Objective: Understand vocabulary and interactions common in a professional investment setting.

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#### Dialogue – Speaking with an Investment Advisor

Students will practice their freeform speaking skills by role-playing as a financial planner answering customer questions.

Objective: Develop fluency in discussing financial planning and advising scenarios.

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#### Writing and Speaking Lab

In this section:

- The student will answer spoken questions prepared by the tutor.
- The student will plan and write an email following the tutor's written instructions.
- The learner will write 10 sentences using vocabulary provided.
- The learner will speak about the future of their current industry.

The tutor will give feedback on this work.

### **Module: Customer Service – Suggestions, Inquiries and Complaints (ADVANCED)**

#### Introduction

In this block, students will consolidate previous customer service terms and be introduced to advanced vocabulary terms.

Students will listen to a short, realistic dialogue of a business client with a problem concerning her company cell phones. The learner will work on their freeform speaking by answering questions related to personal and business cell phones and technology.

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At the end of the module, the student will answer, in writing and orally, questions from the tutor to be sent by email.

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#### Customer Service Vocabulary

Students will study advanced customer service terms and expressions. In this final customer service lesson, we will look at vocabulary such as:

- mark up
- mission statement
- consequences
- customer focused

These terms are presented in context through sentences, and definitions are provided for each term or expression. Students can practice their speaking while learning the meanings of each term.

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#### Typical Situation – Mobile Phone Company

In this lesson, students will practice their understanding and listening comprehension by following a typical real-life situation involving a business client and a customer service representative.

Objective: Recognize and use advanced vocabulary in the context of customer service problem-solving.

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#### Dialogue – Personal and Business Cell Phones

Students will practice their freeform speaking skills by answering questions about personal and business phone etiquette and usage.

Objective: Improve fluency when discussing customer service issues related to mobile technology.

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#### Writing and Speaking Lab

In this section:

- The student will answer spoken questions prepared by the tutor.
- The student will plan and write an email following the tutor's written instructions.
- The student will write a short business letter.
- The student will speak about a customer service experience in as much detail as possible.

The tutor will give feedback on this work.

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#### **Module: General Business – Advertising, Business Expressions (ADVANCED)**

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## **Introduction**

In this block, students will consolidate previous general business terms and be introduced to advanced business vocabulary.

Students will listen to a short, realistic dialogue of employees attending a sales meeting. The learner will work on their freeform speaking by answering questions related to self-employment and unemployment.

At the end of the module, the student will answer, in writing and orally, questions from the tutor to be sent by email.

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## **Business Vocabulary**

Students will study advanced business terms and expressions. In this final general business lesson, we will look at vocabulary and expressions such as:

- headquarters
- monopoly
- economy of scale
- valuation
- swag
- waiver
- thrown under the bus
- title
- zoning
- withholding
- fiscal policy

These terms are presented in context through sentences, and definitions are provided for each term or expression. Students can practice their speaking while learning the meanings of each term.

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## **Typical Situation – In a Business Meeting**

In this lesson, students will practice their understanding and listening comprehension by following a typical real-life situation in a business environment involving a sales meeting.

**Objective:** Recognize and use advanced vocabulary in the context of business discussions.

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## **Dialogue – Self-Employment and Unemployment**

Students will practice their freeform speaking skills by answering questions about employment.

**Objective:** Improve fluency when discussing employment status and workplace dynamics.

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## **Writing and Speaking Lab**

In this section:

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- The student will answer spoken questions prepared by the tutor.
- The student will plan and write an email following the tutor's written instructions.
- The student will use eight business expressions in original sentences.
- The student will speak about how technology has created or changed their current job industry.

The tutor will give feedback on this work.

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