

Statistics & Business

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Savings & Investment Strategies - Savings and investments help diminish financial worries and makes money work. This lesson identifies reasons for saving and investing, evaluates cost and benefits of various savings options, evaluates risk and return of various investment options, provides a plan for saving and investing, analyzes the relationship between risk and return, and interprets the role of goal setting in saving and investing.

M		(4) The student demonstrates an understanding of the fundamental principles of money. The student is expected to: (D) describe sources of income, including wages and salaries, interest, rent, dividends, capital gains, and transfer payments	Student Holiday
T		(ii) describe sources of income, including interest (iii) describe sources of income, including rent (iv) describe sources of income, including dividends (v) describe sources of income, including capital gains (vi) describe sources of income, including transfer payments	Introduce Saving & Investment Strategies Unit Distribute the reference pages: Saving & Investment Strategies Vocabulary Handout, Pay Yourself First Student Handout, Annual Calculations Student Handout, Buying & Selling Investments Student Handout, Diversification vs. Asset Allocation Student Handout, Impact of Inflation on Savings Student Handout, A Closer Look at Bonds Student Handout, A Closer Look at Mutual Funds Student Handout and the A Closer Look at Stocks Student Handout Slides 1-15 / Group Assessment Introduce the Regulations of Saving & Investment Project Distribute the Calculating Interest Activity Slides 16-20 / Group Assessment Work on Saving & Investment Project
W		(E) explain the time value of money (i) explain the time value of money	Slides 21-36 / Group Assessment Saving Vehicles Activity
Th		(i) explain the time value of money (9) The student examines how personal financial decisions are used to achieve financial goals. The student is expected to: (B) explain the benefits of saving and investing	Slides 37-48 / Group Assessment remaining class time will be for students to work on their Projects.
F		(i) explain the benefits of saving (ii) explain the benefits of investing (11) The student identifies various investment strategies. The student is expected to: (A) evaluate different types of investments such as stocks, bonds, and property (i) evaluate different types of investments (B) evaluate investment goals and objectives as they relate to risk tolerance (i) evaluate investment goals and objectives as they relate to risk tolerance (E) investigate the factors that affect the value of investments (i) investigate the factors that affect the value of investments	Play the Stock Market Game https://www.stockmarketgame.org/ https://www.smgig.org/static/media/overview.42112d221e105e213a24.pdf