



Financial Services

Financial Road Map

- Setting financial goals
- Compare savings options
- Building a budget
- Savings account benefits

Credit Union Tour & Scavenger Hunt

- Identifying services provided
- Spending alternatives
- Keeping money safe
- Helping money grow with time

Making Choices

“Your Financial Life” Simulation

- Needs vs. wants
- Debt and saving
- Careers and income
- Practicing smart money management

Book: Gabriel Gets a Great Deal

- The role of advertisements
- Comparison shopping
- Benefits of reducing costs
- Needs vs. wants

Saving

Book: Save like Shanti

- Setting savings goals
- Earning income for goals
- Accumulating money
- Saving ties in to needs & wants

Credit

Book: Brody Borrows Money

- Cost of borrowing
- Credit score components
- Interpreting a credit report
- Borrowing what you can afford

To Lend or Not to Lend

- Borrowing examples
- Loaning money costs & benefits
- How actions impact approvals
- Responsible and irresponsible borrowing

Careers

Show Me the Money BINGO

- Earning income
- Types of jobs
- Skills required for jobs
- Understanding the relationship between income and work

Essentials

Be Your Own Boss

- Key business plan components
- The importance of the idea
- Famous entrepreneurs
- Considerations for starting a business

Book: Lily Learns Wants and Needs

- Limited resources
- Comparison shopping benefits
- Importance of prioritizing
- Determining when purchasing needs is most appropriate

Book: Kyle Keeps Track of Cash

- Learn about budgeting
- Maintaining a balance
- Coin values
- Defining income and expenses

Contact Us



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