



**NAME**

Financial Planning

**DESCRIPTION**

We need money to survive, and this seminar is focused entirely on how to manage all of the money that you've spent countless hours working hard to earn! This seminar is broken down into six interconnected but distinct aspects of financial planning, which are: Money Management, Borrowing, Earning Power, Investing, Financial Services, and Insurance. Throughout the seminar, students will be creating and adding to a financial portfolio that is separated into these six sections. At the conclusion of the seminar, students will have all of the knowledge that they need in order to go out into the real world and be a smart, self-interested consumer.

**DRIVING QUESTION**

How can we, as consumers, make the most of our earning potential?

**FINAL PROJECT OPTION**

Students will create and continuously refine a financial portfolio that is separated into six sections that will be covered throughout the seminar. The six sections are:

- Money Management
- Borrowing
- Earning Power
- Investing
- Financial Services
- Insurance

The portfolio will directly relate to the student and the student's income and earning power. All aspects of the portfolio will be about the student.

Students will create and continuously refine a financial portfolio that is separated into six sections that will be covered throughout the seminar. The six sections are:

- Money Management
- Borrowing
- Earning Power
- Investing
- Financial Services
- Insurance

The portfolio will be about the student's family and the family's income and earning power. All aspects of the portfolio will concern the family of the student.

The student will present these six aspects of their portfolio to their families at the conclusion of the seminar for feedback and reactions.

The student will present these six aspects of their portfolio to their families at the conclusion of the seminar for feedback and reactions.

## ACADEMIC MASTERY CREDIT PATHWAYS

Future Readiness: Financial Planning, Saving, Investing and Debt, Using Economics in Life, Data Interpretation, Oral Fluency

### MILESTONES *(Subject to change, see myLC for assigned tasks in real time.)*

Week	Milestone
1	Portfolio: Choose your final product
2	Portfolio: Money Management section of portfolio is complete
3	Portfolio: Borrowing section of portfolio is complete
4	Portfolio: Earning Power section of portfolio is complete
5	Portfolio: Investing section of portfolio is complete
6	Portfolio: Financial Services Section of portfolio is complete
7	Portfolio: Portfolio Presentation