

# Instructions for Workshop Leader

Use these slides (in order) with the sections of your session outline

Welcome and Overview (Slides 2-4)

Activity (Slides 5-9)

Present (Slides 10-11)

Discuss (Slide 12)

Review and Evaluate (Slides 13-18)

Close (Slide 19)





Move Forward Well

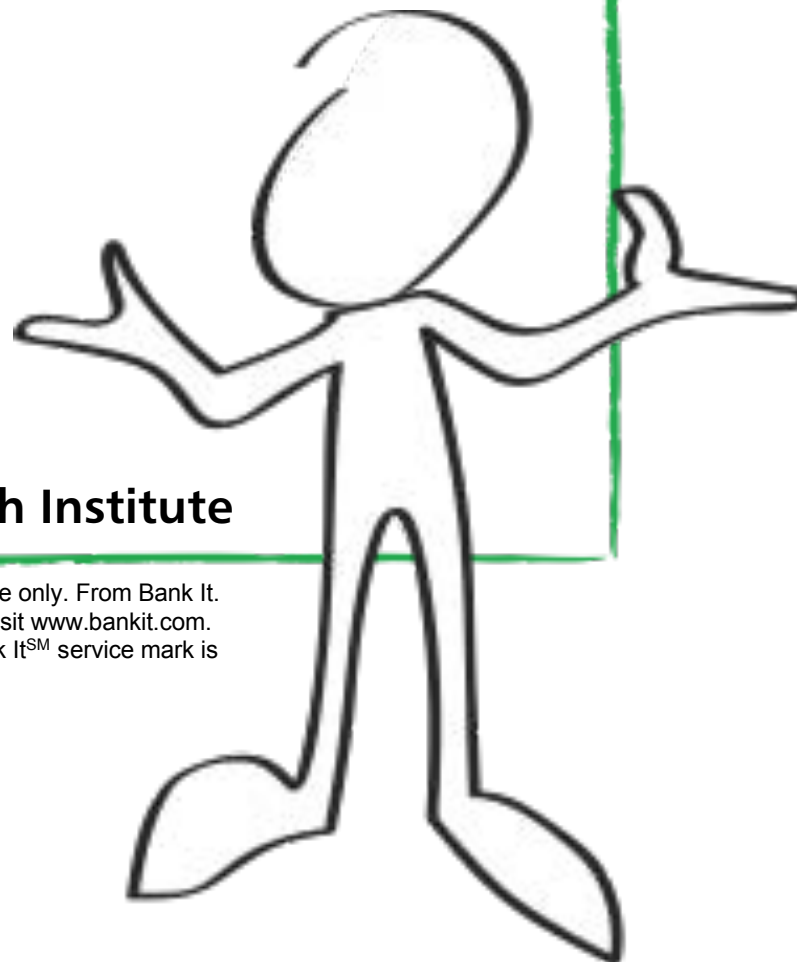
# Welcome to Bank It

## Succeeding with Your Money

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# Welcome and Overview

## What is Bank It?

Bank It delivers real-world topics and tools to help you:

- Understand,
- Talk about, and
- Manage your money.

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# Welcome and Overview

Three goals for today:

1. Explain how the amount of money you have affects the choices you make.
2. Describe what it means to succeed with your money.
3. Explain what it means to be a financially responsible person.



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# Activity

## What Is Money Success?



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# Activity

What does it mean to  
succeed with your money?



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# Activity

What does it mean to be a financially responsible person?



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# Activity

Why is a budget a key way to be financially responsible?



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# Activity

What are examples of positive money choices?



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# Present

How does the way you use money today  
affect your future?



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# Present

How does the amount of money you have affect the choices you make?



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# Discuss

Turn to talk to someone near you.

1. Say your first name.
2. What is one step you plan to take to succeed with the way you manage your money?



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# Review and Evaluate

How does the way you use your money today affect your future?

If most of your money choices are good today, then you're more likely to have more good money choices in the future because you'll have more money.



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# Review and Evaluate

How does the amount of money you have affect the choices you make?

When you have more money you have more choices. No matter how much money you have, it's important to keep track of what's coming in and going out.



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# Review and Evaluate

What does it mean to succeed with your money?

This varies by person.

- Keeping track of your money.
- Earning money in productive ways that tap into your interests and skills.
- Saving.
- Giving money to good causes.
- Being financially responsible.



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# Review and Evaluate

What are examples of positive money choices?

- Keeping track of how money comes in and goes out.
- Lifelong learning.
- Setting financial goals.
- Achieving financial goals.



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# Review and Evaluate

What does it mean to be a financially responsible person?

1. Have more money coming in than going out (or at least have it even).
2. Know the difference between a want and a need.
3. Budget your money.
4. Prepare for the unexpected.
5. Work through difficult money situations and mistakes.



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# Review and Evaluate

Why is a budget a key way to be financially responsible?

- A budget puts you in charge of your money.
- When you budget, you keep track of how your money is coming and going out.
- A budget can help you set and achieve money goals.



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# Close

How will you keep moving forward  
with your money?



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