

# Instructions for Workshop Leader

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

Welcome and Overview (Slides 2-4)

Activity (Slides 5-10)

Present (Slide 11)

Discuss (Slide 12)

Review and Evaluate (Slides 13-18)

Close (Slide 19)





Invest Well

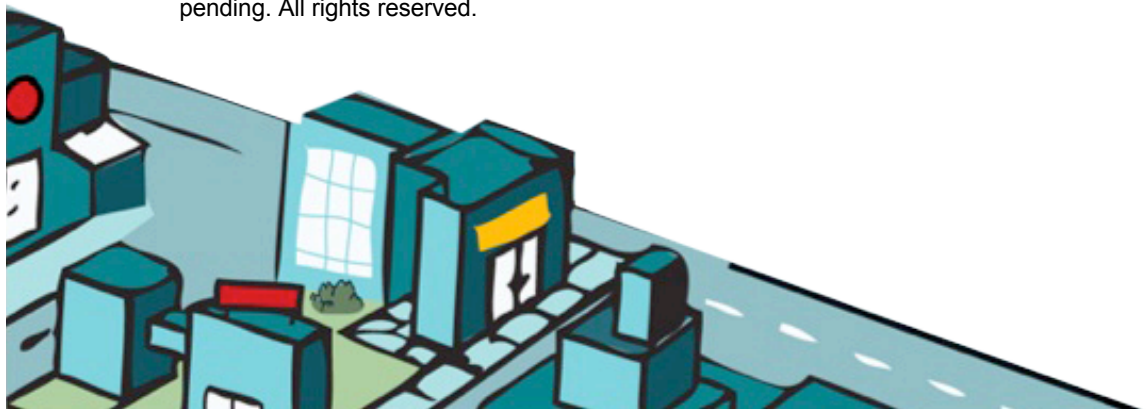
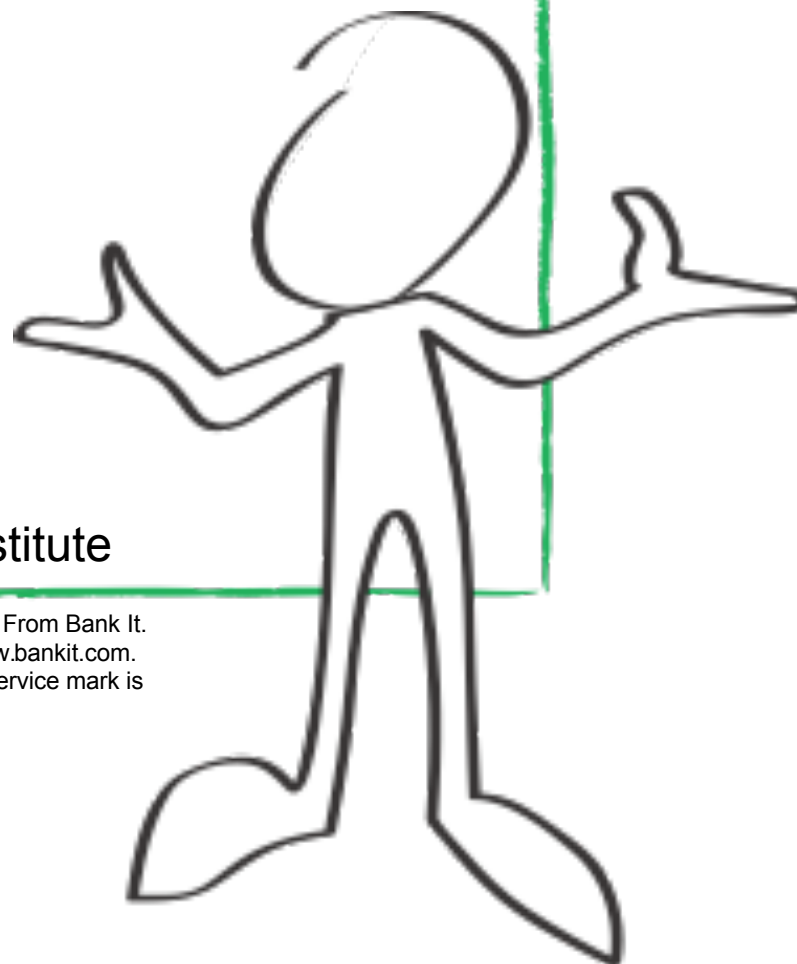
# Welcome to Bank It

## Stocks and Bonds

2-IN-T

Sponsored by Capital One and Search Institute

Permission to photocopy this handout granted for individual and educational use only. From Bank It. Copyright © 2010 by Capital One and Search Institute. For more information, visit [www.bankit.com](http://www.bankit.com). Capital One® and Search Institute® are federally registered service marks. Bank It<sup>SM</sup> service mark is pending. All rights reserved.



# 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.

From Capital One and Search Institute



2-IN-T



# Welcome and Overview

Three goals for today:

1. Identify what a stock is.
2. Describe what affects the value of a stock.
3. Identify what a mutual fund is.



2-IN-T



# Activity

## Role-Play a Script

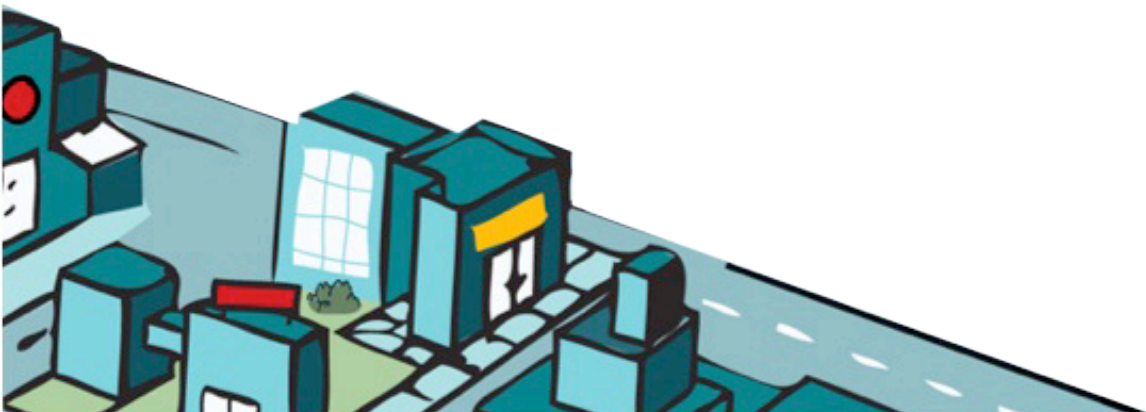


2-IN-T



# Activity

What is a stock?



2-IN-T



# Activity

What affects the value of a stock?

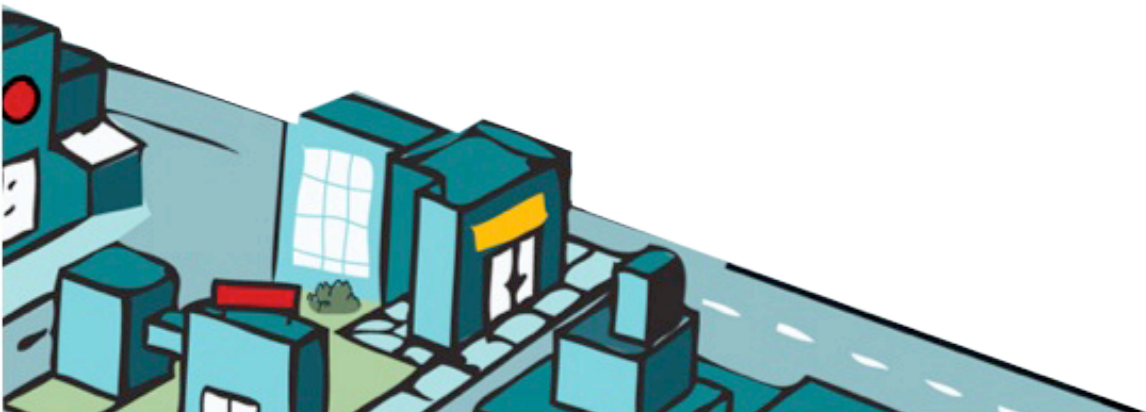


2-IN-T



# Present

What is a bond?



2-IN-T





# Present

How do stocks and bonds differ?



2-IN-T



# Present

What is a mutual fund?

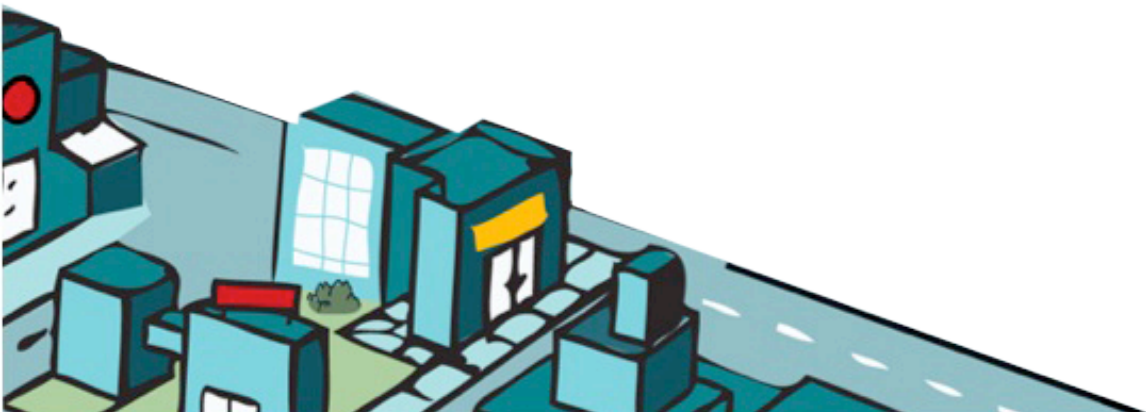


2-IN-T



# Present

What is a diversified portfolio?



2-IN-T



# Discuss

Turn to talk to someone near you.

1. Say your first name
2. Which type of investing are you most comfortable with? Why?



2-IN-T



# Review and Evaluate

## What is a stock?

A stock is an ownership in a company in terms of shares.



2-IN-T



# Review and Evaluate

What affects the value of a stock?

1. How well the company is doing business wise
2. The demand for the stock
3. The overall economy



2-IN-T



# Review and Evaluate

## What is a bond?

A bond is a certificate where you lend a business or government money. Over time, that business will pay you back with interest.



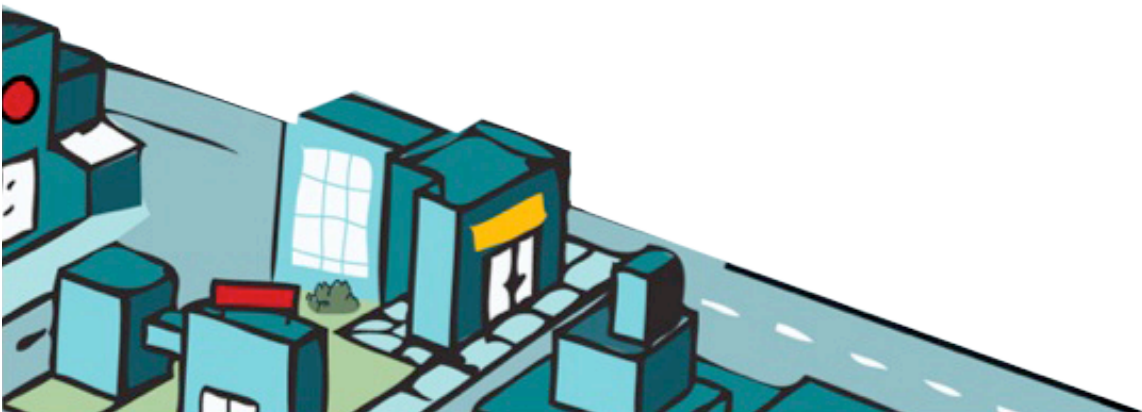
2-IN-T



# Review and Evaluate

## How do stocks and bonds differ?

1. Bonds have a defined term. Stocks do not.
2. Bonds have a specific interest rate. The value and rate of a stock changes constantly.
3. Bonds are safer. Stocks are more risky.



2-IN-T





# Review and Evaluate

## What is a mutual fund?

A mutual fund is a mix of different investment funds.



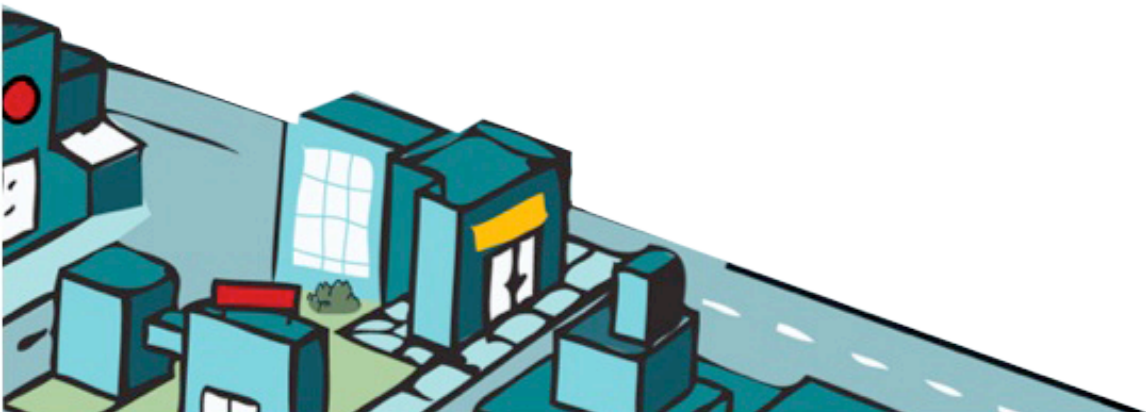
2-IN-T



# Review and Evaluate

## What is a diversified portfolio?

A diversified portfolio is investing in a number of different investments to earn the most money while reducing risk.

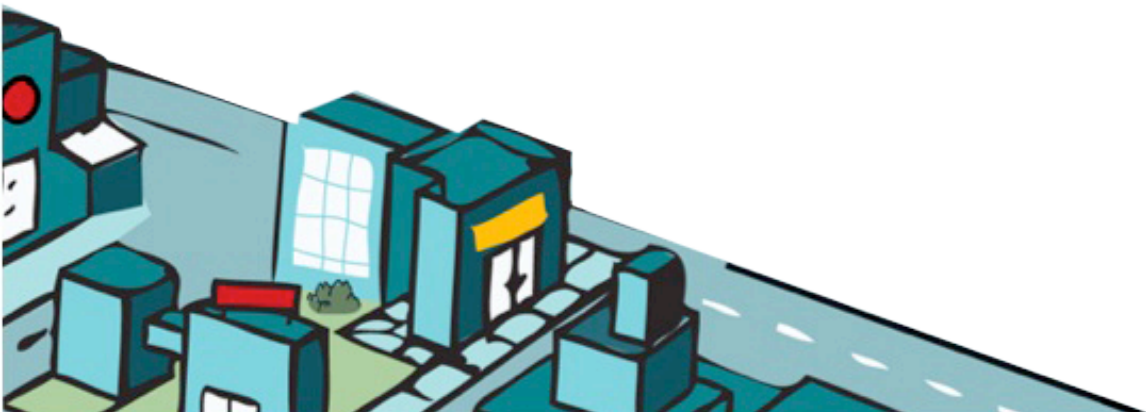


2-IN-T



# Close

What do you think of investing  
in stocks and bonds?



2-IN-T

