

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)





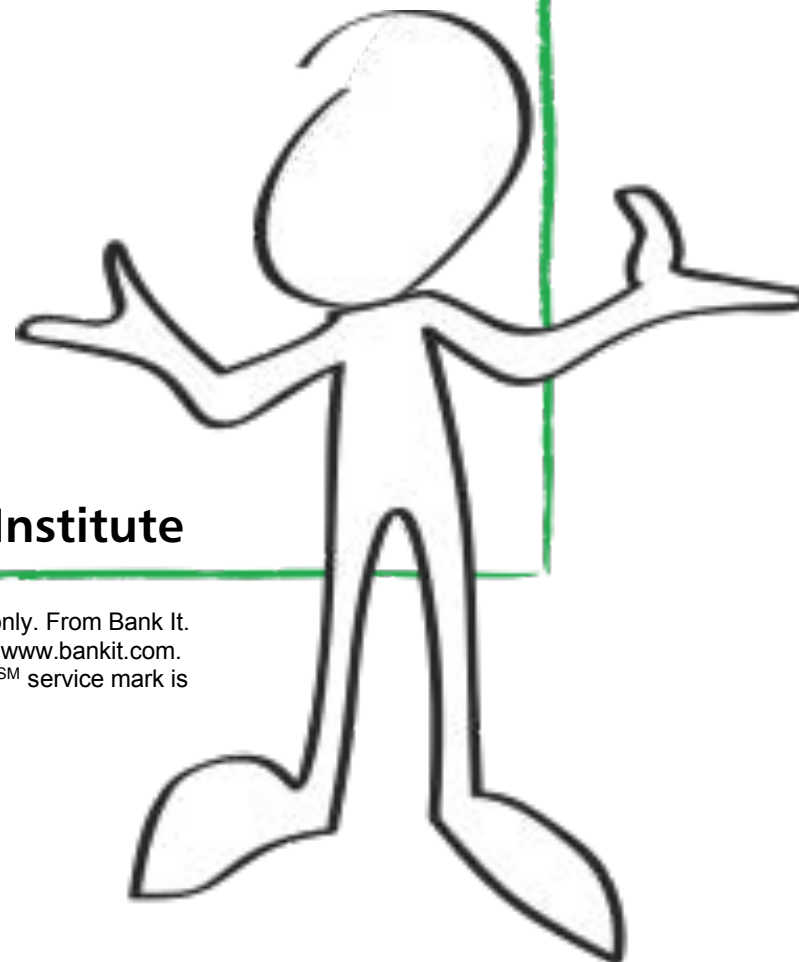
Invest Well

Welcome to Bank It

Investing in Stocks and Bonds

2-IN-PT

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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. Identify what a bond is.
2. Explain how stocks and bonds differ.
3. Describe the benefits of a diversified portfolio.



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Activity

Role Play a Script



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Activity

What is a stock?



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Activity

What affects the value of a stock?



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Present

What is a bond?



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Present

How do stocks and bonds differ?



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Present

What is a mutual fund?



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Present

What is a diversified portfolio?



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Discuss

Turn to talk to someone near you.

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



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Review and Evaluate

What is a stock?

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



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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



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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.



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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.



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Review and Evaluate

What is a mutual fund?

A mutual fund is a mix of different investment funds.



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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.



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Close

What do you think of investing
in stocks and bonds?



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