

Instructions for Workshop Leader

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

Welcome and Overview (Slides 2-4)

Activity (Slides 5-8)

Present (Slides 9-11)

Discuss (Slide 12)

Review and Evaluate (Slides 13-18)

Close (Slide 19)





Dream Well

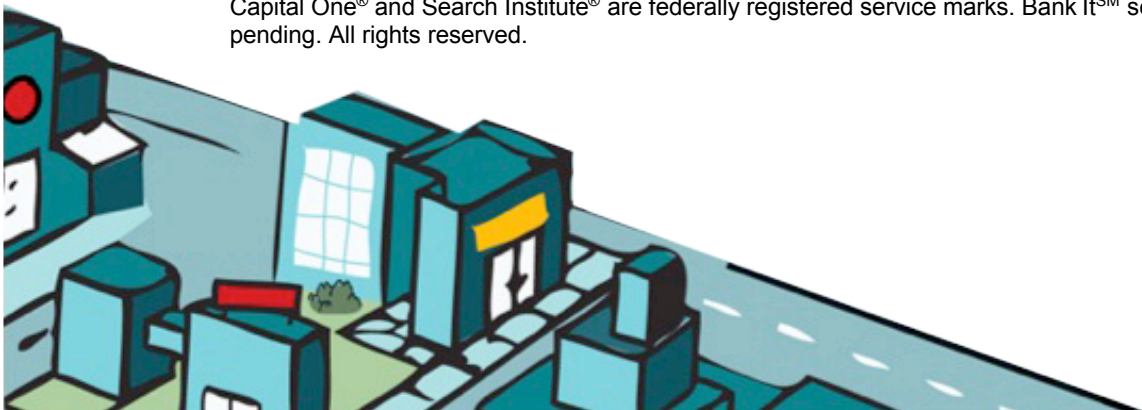
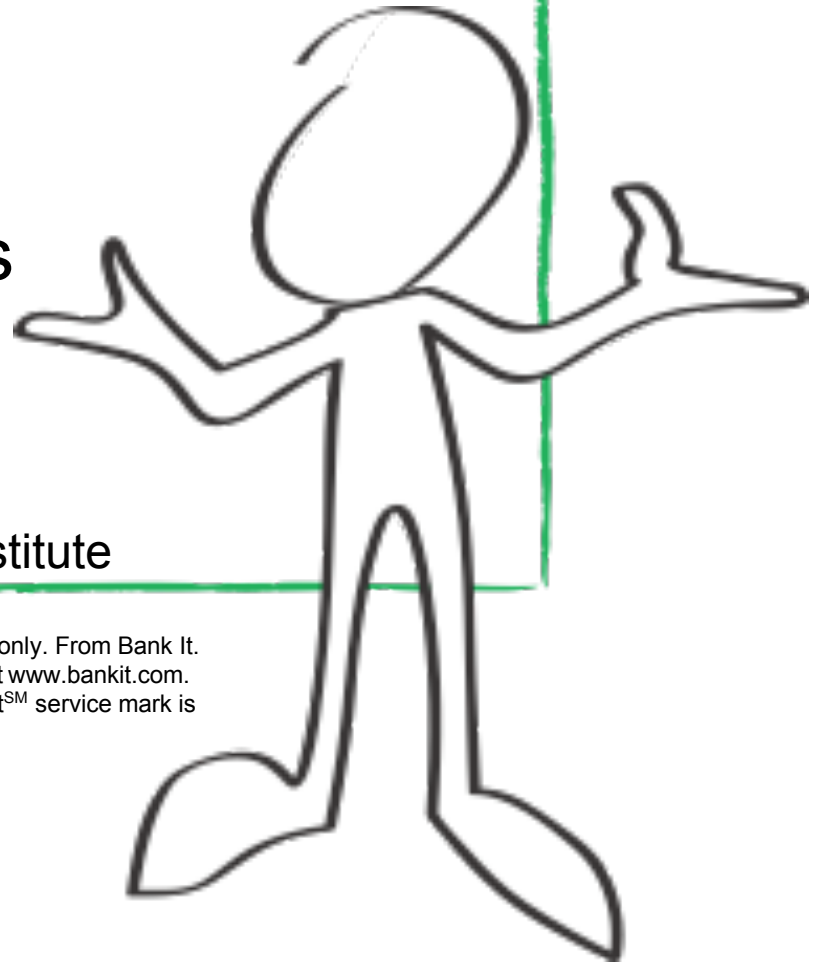
Welcome to Bank It

Your Money, Your Dreams

3-DR-T

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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 what a net worth statement is.
2. Name an example of a household asset.
3. Describe what a liability is.



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Activity

To manage your money and dreams well,
it's important to have an overall plan,
a personal financial plan.



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Activity

Your Overall Money Plan



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Activity

What might be included in a personal financial plan?



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Activity

How can an up-to-date budget help you pursue your dreams?



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Present

What is a net worth statement?



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Present

What are examples of household assets?



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Present

What is a liability?



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Discuss

Turn to talk to someone near you.

1. Say your first name.
2. How do you plan to keep track of your overall money situation?



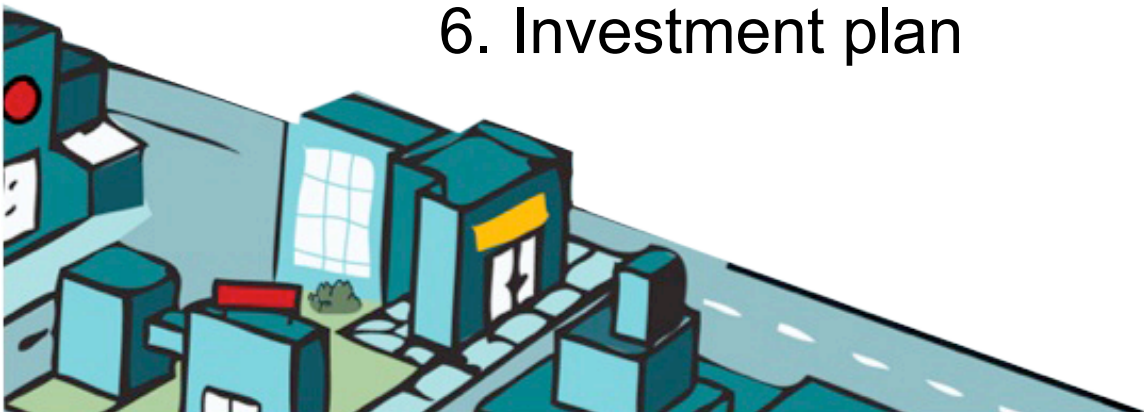
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Review and Evaluate

What are examples of what might be included in a personal financial plan?

1. Budget
2. Financial goals
3. Net worth statement
4. Cash flow statement
5. Insurance plan
6. Investment plan



Review and Evaluate

How can an up-to-date budget help you pursue your dreams?

A budget gives you specific information about how your money is coming in and going out. It helps you make decisions about how to use your money.



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Review and Evaluate

What is a net worth statement?

A net worth statement measures a person's financial health at a point in time. It includes what the person owns, called "assets," and what a person owes, called "liabilities."



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Review and Evaluate

What are examples of household assets?

- Cash
- Value of home that you own
- IRAs
- Stocks and mutual funds
- Bonds
- Collections



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Review and Evaluate

What is a liability?

A liability is what you owe.



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Review and Evaluate

How can a personal financial plan help you pursue your dreams?

A personal financial plan can help you pursue your dreams by giving you a plan and an overview of what's happening with your money.



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Close

Having an overall plan of what's happening with your money can help you live the life you dream of.



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