

INVESTING

LESSON OVERVIEW

In this lesson students will learn about investing and how to diversify and build an investment portfolio to increase their net worth and provide a financial legacy for the next generation. Gain an understanding of risk and reward, asset appreciation, and the various investment vehicle options available.

TOPIC: Investing

TIME REQUIRED: 50 minutes

LEARNING OBJECTIVES:

Students will be able to...

- Explain how investing can help accomplish financial goals and increase wealth.
- Understand financial products such as: stocks, bonds, and mutual funds.
- Understand the basics of investing.

SUPPLIES:

- Overhead projector and screen
- Loose-leaf paper to take notes

PREPARATION:

- Print out Student Evaluation Sheet for each student
- Print out attendance sheet
- Set up projector with presentation slides
- Internet connectivity

STUDENT HANDOUT:

- Pre & Post Assessment Sheets

STUDENT PRESENTATION SLIDES:

- Mind Over Money Skills Investor Education PowerPoint

ESSENTIAL QUESTIONS:

- What is the difference in diversification and asset allocation?
- How do I purchase a stock, bond, or mutual fund?
- Why is compounding interest so important?
- What is the best investment?

ASSESSMENT ACTIVITIES:

- Students fill out pre and post assessment sheets
- Students fill out Student Evaluation Sheets