



Personal Finance
Lewis S. Mills High School
Burlington, CT

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Business Education Teacher

The Basics

- **Half-year course**
- **11th & 12th grades**
- **Twenty students per section**
- **Grading –**
 - **Tests 45%**
 - **Projects/Quizzes 30%**
 - **Homework 25%**
- **Handouts**
 - **Philosophy & Overview**
 - **Connection to Standards**
 - **Curriculum Map**
 - **Syllabus**
 - **Student Performance Expectations Rubric**



Topics Covered

🏦 Money

- Bringing it Home

🏦 Budgeting

- Money In
- Money Out

🏦 Banks & Banking

- Why/Which One

🏦 Credit

- A Matter of Trust



Topics Covered (cont'd.)

• Saving & Investing

• Putting Money to Work

▪ Protecting Your Assets

– Insurances

• The Government Needs Income Too

• Taxes



Unit Titles from Personal Finance Program – NYC Dept of Ed – Muriel Seibert Foundation

To Book or Not? That is the Question

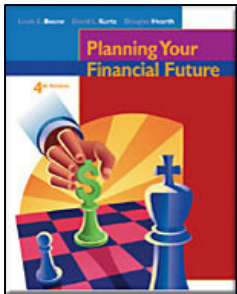
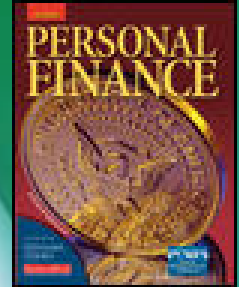
• Books that we considered buying:

- Personal Finance – Glenco

- Managing your Personal Finance – Thompson Learning/Cengage

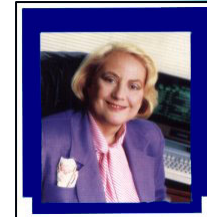
• Still trying to decide –

- so many free resources that could be used – most up to date current information



Resources

- **Personal Finance Program
Taking Control Of Your Financial Future NYC
Department of Education
Muriel Siebert Foundation
<https://www.siebertpfp.com/index.aspx>**



- Personal Finance Project Resource Book
www.sde.ct.gov/**

- **Connecticut Personal Finance Education
<http://www.ctfinancialled.com/>**



Resources cont'd.



A nonprofit foundation partnering for financial well-being.

- www.hsfpp.nefe.org

- www.ja.org



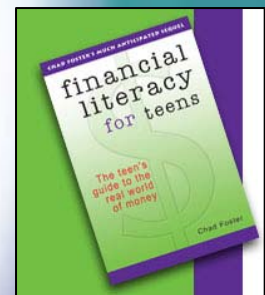
- Playbook for Life www.playbook.thehartford.com

- Internal Training Services - <http://www.finlitproject.com/>

- Students Introduction to Insurance
- Your Personal Guide to Loans and Credit
- Your checking Account

- Financial literacy for Teens

- The teens guide to the real world of money – Chad Foster



- VISA – Practical Money Skills for Life <http://www.practicalmoneyskills.com/>

VISA

Practical Money Skills
for Life

Virtual Business Personal Finance



Personal Finance Software LESSONS INCLUDE

Scheduling Your Day
Finding A Job
Getting An Apartment
Choosing Transportation
Healthy Living
Checking Accounts
Getting A Credit Card
Your Credit Score

Saving Money
Getting An Education,
Online Banking
Dealing With Taxes
Investing In The Stock Market
Buying A Home
Choosing A Mortgage
Insurance
Building A Career

Financial Literacy Challenge

- **An initiative recommended by the President's Advisory Council on Financial Literacy, the 2008 National Financial Literacy Challenge is a voluntary recognition program for U.S. high school students.**
- **The Challenge's 35 questions correlate to the 2007 content standards published by the Jump\$tart coalition for Personal Financial Literacy.**
- **The Challenge was developed by the U.S. Department of the Treasury in consultation with economists and the Jump\$tart Coalition for Personal Financial Literacy, Junior Achievement USA, the National Council on Economic Education, and the National Endowment for Financial Education.**
- **In 2007 there were 46,000 students who participated in the challenge – we had 15 students participate and 10 placed in the top 25th percentile – they were recognized with certificates for their accomplishment. In fall 2008 year there were 75,000 students who participated in the challenge - we had 31 participate and 15 placed in the top 25th percentile.**
- **www.fl.s.treas.gov**

Speakers

- **Local Banks, Credit Unions**
- **Financial Advisors**
- **Insurance Representatives**
- **Human Resources Professional**

Field Trips



- www.juniortours.com



- **Impact Educational Tours**
(\$130 per student New York Wall Street, American Financial Museum, and Hollywood)
www.impacttours.com



- **Places to visit in NYC**
 - Federal Reserve Bank
 - Wall Street
 - Museum of American Finance
 - SONY Technology Wonder Lab
 - NBC Studios

**MU\$EUM
OF AMERICAN
FINANCE**



- **Schedule the visit on your own**



LSM School & Community Partnership

- **Formalized Business Advisory Board**
- **Internships**
- **Shadowing**
- **Broaden Speaker Bureau**
- **Remain current on acceptable business practices and procedures**



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