

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 9–12)

Discuss (Slide 13)

Review and Evaluate (Slides 14–20)

Close (Slide 21)



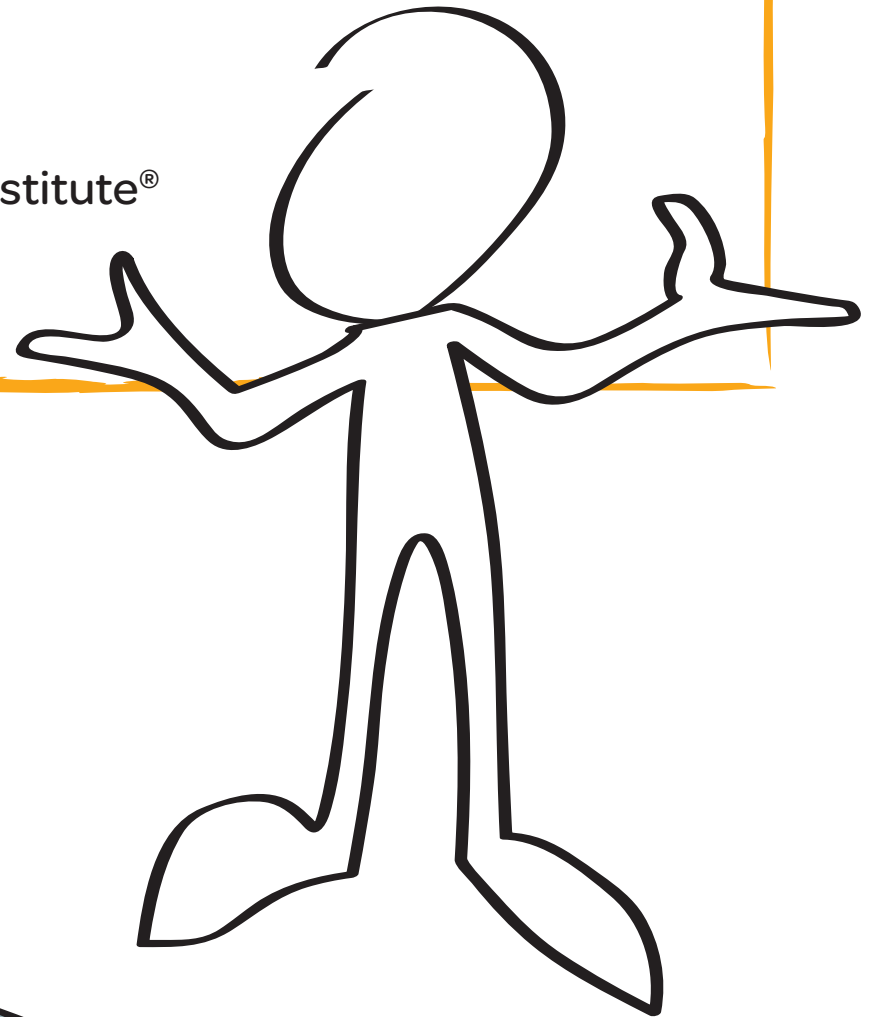
Dream Well

Welcome to Bank It

Your Dreams and Your Money

1-DR-E

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Welcome and Overview

What is Bank It?

Bank It delivers real-world topics and tools to help you:

- Understand your money,
- Talk about your money, and
- Manage your money.

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Welcome and Overview

Three goals for today:

1. Describe what a financial goal is.
2. State a measurable, short-term financial goal.
3. Give examples of household assets.



Activity

Take the Pretest



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Activity

What is the definition of a financial goal?



Activity

What is true about short-term and long-term financial goals?

1. A short-term financial goal is usually achieved in less than one year.
2. A long-term financial goal is usually achieved in five years or more.



Activity

Short Term or Long Term?



Present

How does setting a financial goal help you realize your dreams?

1. You know where you're going with your dreams and your money.
2. You can develop a plan for your future.



Present

What is an example of a short-term financial goal for a working adult?

Answer: Saving \$200.



Present

What is an important step for pursuing a short-term money goal?

- Step #1: Name your money goal.
- Step #2: Make a plan with a timeline to meet your money goal.
- Step #3: Work toward your money goal.
- Step #4: Achieve your money goal.



Present

What is an example of a household asset?

Answer: Your family's refrigerator



Discuss

Turn to talk to someone near you.

1. Say your first name.
2. What is a long-term dream you have for yourself?



Review and Evaluate

What is the definition of a financial goal?

Answer: A financial goal is a money target you're aiming for.



Review and Evaluate

What is true about short-term and long-term financial goals?

1. A short-term financial goal is usually achieved in less than one year.
2. A long-term financial goal is usually achieved in five years or more.



Review and Evaluate

How does setting a financial goal help you realize your dreams?

1. You know where you're going with your dreams and your money.
2. You can develop a plan for your future.



Review and Evaluate

What is an example of a short-term financial goal for a working adult?

Answer: Saving \$200.



Review and Evaluate

What is an important step for pursuing a short-term money goal?

- Step #1: Name your money goal.
- Step #2: Make a plan with a timeline to meet your money goal.
- Step #3: Work toward your money goal.
- Step #4: Achieve your money goal.



Review and Evaluate

What is an example of a household asset?

Answer: Your family's refrigerator



Review and Evaluate

Take the Posttest



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Close

We can realize our dreams and our money goals.



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