

# 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)



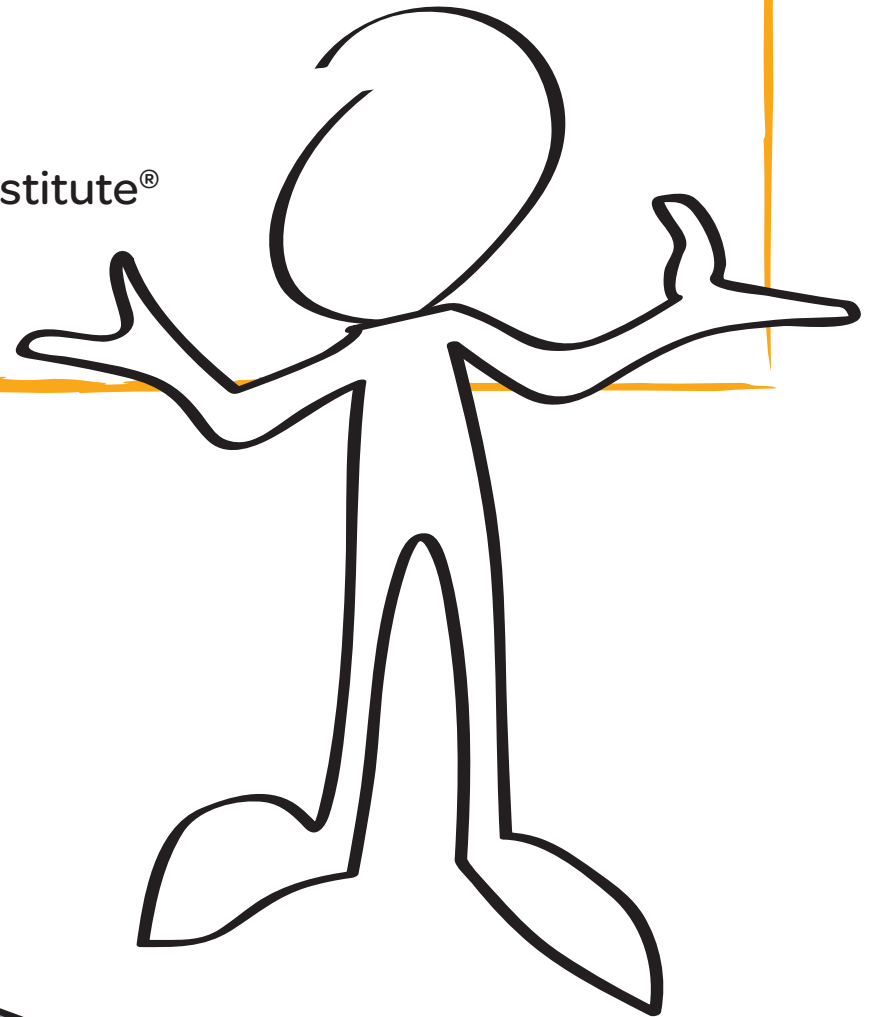
**Dream Well**

# Welcome to Bank It

## Your Kids' Dreams and Their Money

1-DR-PE

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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.

From Capital One and Search Institute



# Welcome and Overview

## Three goals for today:

1. Compare a short-term and a long-term financial goal.
2. State a measurable, short-term financial goal.
3. List the steps to making a short-term financial goal.



# Activity

## Take the Pretest



#1-DR-PE



# 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.
3. Saving for retirement is an example of a long-term goal.



# Activity

## Short Term or Long Term?





# Present

## How does setting a financial goal help you to 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.
3. It gives you a target to aim for.



# 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.
- Step #5: Make changes to your plan if you're hitting obstacles.



# Present

## What is an example of a household asset?

- Your used car
- Your family's refrigerator
- Your wedding ring



# Discuss

**Turn to talk to someone near you.**

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



# Review and Evaluate

## What is the definition of a financial goal?

Answer: A financial goal is a money target that 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.
3. Saving for retirement is an example of a long-term goal.



# Review and Evaluate

**How does setting a financial goal help you to 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.
3. It gives you a target to aim for.





# 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.
- Step #5: Make changes to your plan if you're hitting obstacles.



# Review and Evaluate

**What is an example of a household asset?**

- Your used car
- Your family's refrigerator
- Your wedding ring



# Review and Evaluate

**Take the Posttest**



#1-DR-PE



**Close**

**We can realize our dreams and our money goals.**

**We can help our kids realize their dreams and their money goals.**



#1-DR-PE

