

Education Content Created By



# Your money adventure

## 01: Let the adventure begin



# Facilitator Guide

## 01: Let the adventure begin

### Purpose

The purpose of this facilitator guide is to provide an overview for 01: “Let the adventure begin.” Use this guide in conjunction with the 01 PowerPoint slides and speaker notes to prepare for your first session with participants. This guide includes speaking points to help you ask questions and prompt discussion to generate responses. In addition, there are suggested facilitator notes and a glossary to help maximize the session.

### Module description

In this module, participants are introduced to the “Your money adventure” series. Participants identify and share their dreams and adventures, then take the Knowledge Check and discuss results with their peers. Participants identify things that cost money, research prices, and make connections. Lastly, they identify and record their goals in preparation for future sessions.

### Learning objectives

After completing this module, participants will be able to:

- Identify dreams and adventures
- Share their dreams and adventures with their peers
- Take the Knowledge Check and discuss results with their peers
- Identify things that cost money, research prices, and make connections
- Identify and record their goals

### What you’ll need

To make the most of your time, you should have the following:

- Facilitator computer, LCD projector, 01: “Let the adventure begin” PowerPoint slides, presenter script (digital or paper), participant guides (digital or paper), participant computers (depends on instruction being on-site or virtual).

### Module time

This module will take approximately 60 minutes. See slide 4 for specific timing breakdown.


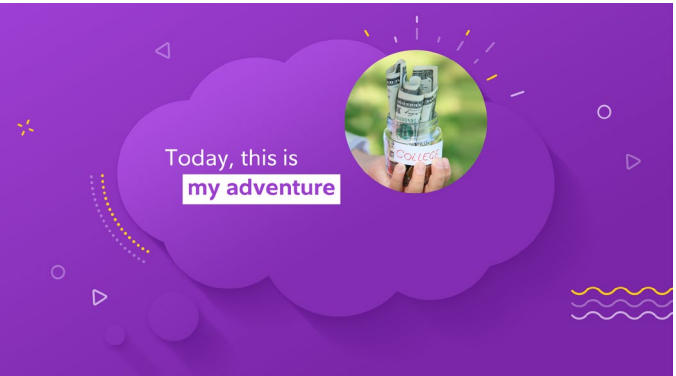
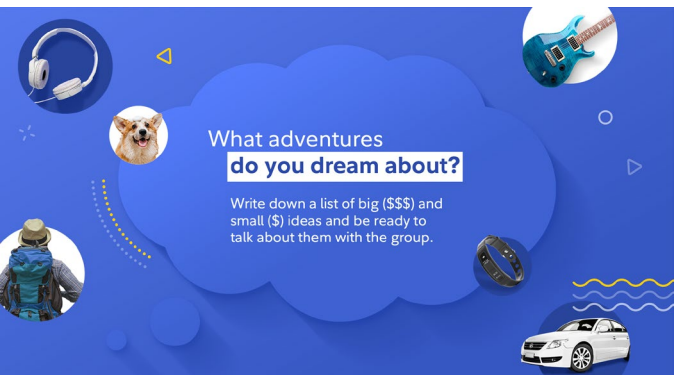
# Process

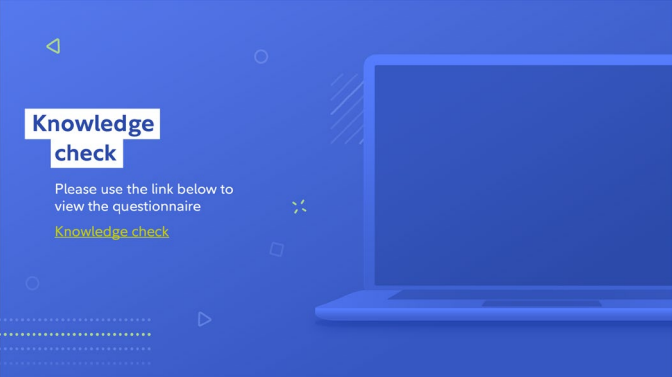
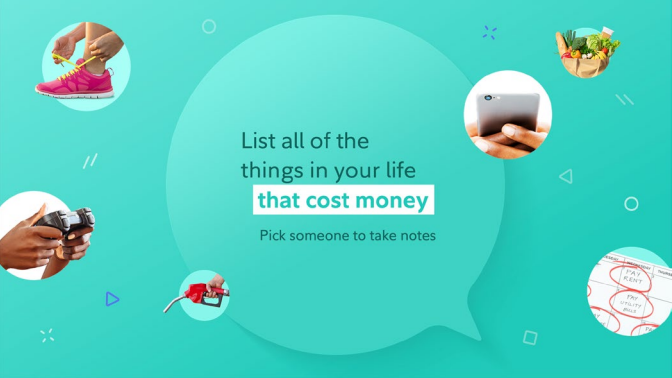
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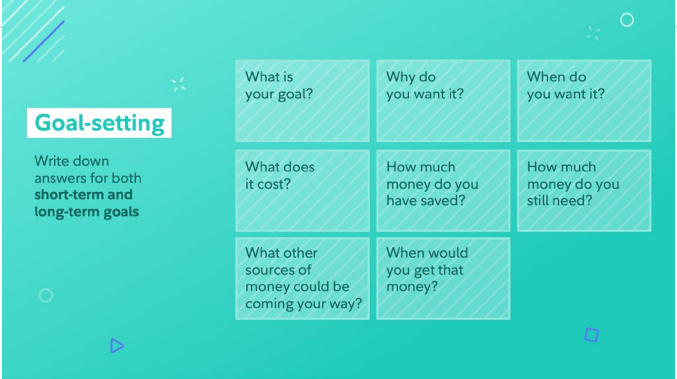
Use these prompts and speaking points to help facilitate the discussion.

Slide	Content	Speaking point
3	Introduce and welcome participants to the start of the 5-week module series.	Welcome all participants.
5	Getting to know the high school you—in advance of this module, please insert your high school picture in the slideshow.	Briefly share your name, role, and how you became interested in personal finance.
6	Question: If money grew on trees, what's one thing you'd spend it on?	<i>Participant responses will vary.</i>



Slide	Content	Speaking point	Thumbnail
9	Adventures I dreamed about— please include something you dreamed about at age 15 and why you wanted it.	Example: “When I was 15, I really wanted a car because I worked at a local fast-food restaurant after school and on the weekends when my parents couldn’t drive me, and I had to walk to get to work.”	
10	Today, this is my adventure.	Finish the sentence as to what adventure looks like to you (the facilitator) today (i.e., a new purchase, saving for vacation, paying off student loan debt, saving for your own children’s future).	
11	Question: What adventures do you dream about?	<p>Direct participants to write down their adventures (or goals) whether large or small.</p> <ul style="list-style-type: none"> <li>This activity should be completed individually (3 minutes)</li> </ul>	

Slide	Content	Speaking point	Thumbnail
12	Question: So, who wants to kick us off?	<p><i>Participant responses will vary.</i></p> <ul style="list-style-type: none"> <li>This activity should take 3 minutes</li> </ul>	
14	Let's get an idea of where we are starting from.	<p>Participants are to take the Knowledge Check.</p> <ul style="list-style-type: none"> <li>Discuss results with participants</li> </ul>	 <p><b>Knowledge check</b></p> <p>Please use the link below to view the questionnaire</p> <p><a href="#">Knowledge check</a></p>
22	Assign participants to breakout rooms.	<p>With your group, list everything you can think of that costs money.</p> <ul style="list-style-type: none"> <li>This activity should take 5 minutes</li> <li>Each group has 1 notetaker</li> </ul>	 <p><b>List all of the things in your life that cost money</b></p> <p>Pick someone to take notes</p>
23	Participants are to rejoin class. Direct participants to help contribute to your master list.	<p><i>Participant responses will vary.</i></p> <p>This list may be posted on an electronic or physical whiteboard.</p>	

Slide	Content	Speaking point	Thumbnail									
23	Continue the conversation by letting participants know that they are to pick something from this list that they have or use in their lives, but they don't know what it costs.	<p>Do a quick search on your computer or phone and find the price. If it's something with a price that changes based on who is selling it or its specifics, look at a few websites and compare.</p> <ul style="list-style-type: none"> <li>Participant responses will vary</li> </ul> <p>When you've got the cost, type in the chat:</p> <ol style="list-style-type: none"> <li>What you looked up</li> <li>What the price is</li> <li>Where you got that price from</li> </ol> <p>Then add this information to the whiteboard.</p> <p>This exercise should take 5 minutes at most.</p>										
25	Direct participants to open their notebooks to record their goals.	Goals may be recorded on paper or via digital methods.										
26	<p>Participants should record their responses to the following question.</p> <p>Question: What is your goal?</p>	<p>Ask participants to reflect on their goal:</p> <ul style="list-style-type: none"> <li>Why do you want it?</li> <li>When do you want it?</li> <li>What does it cost?</li> <li>How much money do you have saved?</li> <li>How much money do you still need?</li> <li>What other sources of money could be coming your way?</li> <li>When would you get that money?</li> </ul> <p>This exercise should take 10 minutes at most.</p>	 <p>The thumbnail shows a teal slide titled 'Goal-setting'. Below the title is the instruction: 'Write down answers for both short-term and long-term goals'. The slide features a 3x3 grid of questions:</p> <table border="1"> <tr> <td>What is your goal?</td> <td>Why do you want it?</td> <td>When do you want it?</td> </tr> <tr> <td>What does it cost?</td> <td>How much money do you have saved?</td> <td>How much money do you still need?</td> </tr> <tr> <td>What other sources of money could be coming your way?</td> <td>When would you get that money?</td> <td></td> </tr> </table>	What is your goal?	Why do you want it?	When do you want it?	What does it cost?	How much money do you have saved?	How much money do you still need?	What other sources of money could be coming your way?	When would you get that money?	
What is your goal?	Why do you want it?	When do you want it?										
What does it cost?	How much money do you have saved?	How much money do you still need?										
What other sources of money could be coming your way?	When would you get that money?											

Slide	Content	Speaking point
26	Encourage participants to share their goals.	<p><i>Participant responses will vary.</i></p> <ul style="list-style-type: none"><li>• This exercise should take 4 minutes at most</li></ul>



### Closing comments

Thank participants for their participation and let them know they have now earned their goal-setting virtual pin. They are now prepared for next week's module on saving. Encourage them to check out Fidelity's social media channels for more information on financial concepts.



# Glossary

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## 01: Let the adventure begin

Term	Definition
<b>Goal</b>	A goal is something a person sets out to achieve and may be unique to that individual.
<b>Long-term goal</b>	A long-term goal is one you set out to achieve that is longer than 3 years. Money may grow over time with investment earnings.
<b>Needs</b>	Needs are an essential expense.
<b>Short-term goal</b>	A short-term goal is money set aside for something coming up soon (usually in a year or less).
<b>Wants</b>	Wants are an expense that may not be essential.

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