

Education Content Created By



# Your money adventure

## 01: Let the adventure begin



# Participant Guide

## 01: Let the adventure begin

### **Purpose**

The purpose of this participant guide is to provide an overview for 01: “Let the adventure begin.” Use this guide in conjunction with the 01 PowerPoint slides and activities to answer questions and record your responses, thoughts, ideas, and observations. This guide includes questions, prompts, and a vocabulary list to help maximize the session.

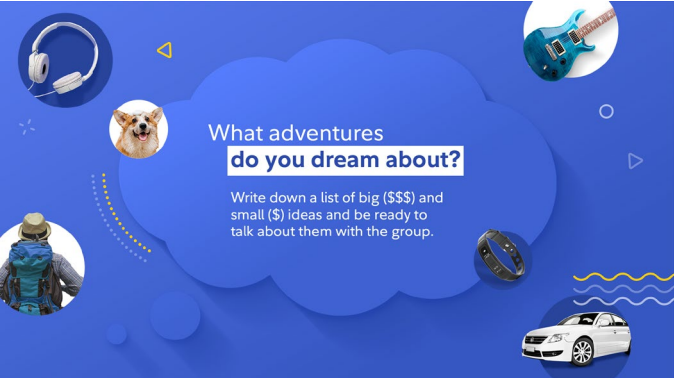
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### **Module description**

In this module, you will be introduced to the “Your money adventure with Fidelity” series. You’ll identify and share dreams and adventures, then take the Knowledge Check and discuss results with peers. You’ll identify things that cost money, research prices, and make connections. Lastly, you will identify and record your goals in preparation for future sessions.

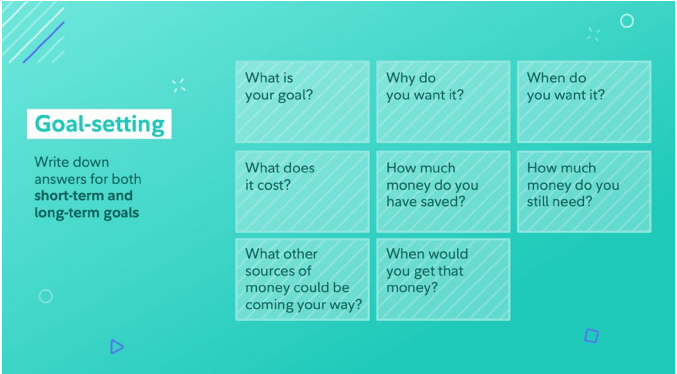


Slide	Content	Record your responses, thoughts, ideas, and observations
3	Introduce and welcome to the start of the 5-week module series from Fidelity.	
6	Question: If money grew on trees, what's one thing you'd spend it on?	

Slide	Content	Record your responses, thoughts, ideas, and observations	Thumbnail
11	Question: What adventures do you dream about?	Write down your adventures (or goals) whether large or small.	

Slide	Content	Record your responses, thoughts, ideas, and observations	Thumbnail
12	Your facilitator may ask participants for responses.		
14	Let's get an idea of where we are starting from.	Take the Knowledge Check <ul style="list-style-type: none"> <li>• Discuss results.</li> </ul>	
22	You will be assigned to a group.	With your group, list the things that cost money. <ul style="list-style-type: none"> <li>• Each group has 1 notetaker.</li> </ul>	



Slide	Content	Record your responses, thoughts, ideas, and observations	Thumbnail									
23	Choose something from this list that you have or use in your life and you 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 the specifics of the thing, look at a few websites and compare.</p> <p>When you've got the cost, type in the chat:</p> <ul 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> </ul>										
25	Open your notebook to record your goals.											
26	Question: What is your goal?	<p>Reflect on your 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>The thumbnail shows a teal-colored worksheet titled "Goal-setting". Below the title, it says "Write down answers for both short-term and long-term goals". The worksheet contains 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

Record your responses, thoughts, ideas, and observations

26

Share your goals.



You've finished this session and earned a goal-setting pin!





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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