

Objectives:

- Demonstrate time value of money (TVM) principles by using the rule of 72 and by manipulating the five variables used in basic TVM calculations.
- Identify and define the types of financial risks, including inflation, deflation, and recession.
- Identify and understand investment options, including retirement planning, long- and short-term investments, and dividend re-investment plans. Understand that investments put principal at risk.
- Discuss the purposes of insurance/risk management.
- Define common insurance options and their purposes, such as automobile, health, home owner/renter, whole/term life, long-term care and disability.



“Unfortunately Mr. Brown, there’s nothing in your policy that covers taking the bull by the horns.”

Monday, November 16th

Get Started: Now and Later

- What’s my Interest?
- Wealth Accumulation

HOMEWORK: Finish Work Started in Class

Tuesday, November 17th

Get Started: Now and Later

- PIT

HOMEWORK: Finish Work Started in Class

Wednesday, November 18th

Get Started: Rule of 72 Practice

- Stock Market Game

HOMEWORK: Finish Work Started in Class

Thursday, November 19th

Get Started: Mayhem Videos

- Protect Your Wealth
- The Everyday Risk of Living, Part 1

HOMEWORK: Finish Work Started in Class

Friday, November 20th

Get Started: Longevity Game

- Everyday Risk of Living, Part 2
- PIT Revisited

HOMEWORK: Finish Work Started in Class