

# Money Crunch Educator Supply List

## Lesson 1: Practical Steps to Building Wealth

- Easel pad with markers, pages labeled “What I Know” and “What I Hope to Learn” *(Slide 8)*
- State of Financial Security table tent, duplicate on card stock, one per participant *(Slide 10)*
- Small Savings Add Up Card, duplicated on card stock and cut apart, one per participant *(Slide 15)*
- Growth of Monthly Contribution to 401(k) handout, duplicated, one per participant *(Slide 17)*
- Debt: How Much is Too Much worksheet, duplicated, one per participant *(Slide 25)*
- List of Creditors worksheet, duplicated, one per participant *(Slide 25)*
- Debt Repayment Plan worksheet, duplicated, one per participant *(Slide 25)*
- T.N.’s Assets & Liabilities cards, duplicated on card stock and cut apart, 1 set of EITHER the \$18,000 or \$27,000 cards *(Slide 34)*
- Net Worth Statement Worksheet, interactive file on your computer *(Slide 34)*
- Net Worth Statement Worksheet, SP612-B, one per participant *(Slide 35)*
- Net Worth Statement Instructions, SP612-A, one per participant *(Slide 35)*
- Your Game Plan for Building Wealth handout, duplicated, one per participant *(Slide 36)*
- Tennessee Saves brochures, one per participant *(Slide 38)*

## Lesson 2: Finding Money to Invest

- Saving-Spending Plan Worksheet, SP613-B, one per participant plus one per group for activity *(Slide 7)*
- Saving-Spending Plan Instructions, SP613-A, one per participant plus one per group for activity *(Slide 7)*
- Track Your Spending Worksheet, duplicated on card stock, one per participant *(Slide 19)*
- Tennessee Saves Receipt Bag, one per participant (Put Track Your Spending Worksheet in a receipt bag for distribution) *(Slide 19)*
- Information on T.N.’s Spending Plan EITHER 18Save and 18Spend OR 27Save and 27Spend, enough that each group will have either a Save or Spend version for the activity *(Slide 20)*
- T.N.’s Emergency, EITHER the \$18,000 OR the \$27,000 version, duplicated, enough for group activity *(Slide 21)*
- Emergency Fund Work Sheet, duplicated, one per participant plus enough for group activity *(Slide 22)*
- Tennessee Saves brochures, enough for participants new to the sessions *(Slide 32)*

### **Lesson 3: Basic Investment Options**

- Financial Tasks Over the Lifecycle timeline cards, duplicated on card stock, one set *(Slide 8)*
- Tape for affixing time line cards to floor or wall *(Slide 8)*
- Financial Tasks Over the Lifecycle task cards, duplicated on card stock and cut apart, one set *(Slide 8)*
- Financial Tasks Over the Lifecycle handout, duplicated, one per participant *(Slide 8)*
- Financial Goals Worksheet, duplicated, one per participant *(Slide 9)*
- Saving and Investing Options flowchart, duplicated on card stock, one per participant *(Slides 16-17)*
- Savings Options for Emergency Funds handout, duplicated, one per participant *(Slide 26)*
- Pencils for mutual fund illustration *(Slide 50)*
- How to Read the Financial Pages handout, duplicated, one per participant *(Slide 64)*
- Copies of financial pages from a newspaper, one per group *(Slide 64)*
- Tennessee Saves brochures, enough for participants new to the sessions *(Slide 66)*

### **Lesson 4: Principles of Investing**

- The Longevity Game gameboards, duplicated on card stock, one per participant *(Slide 9)*
- The Longevity Game instructions, one copy for you *(Slide 9)*
- Ballpark Estimate, duplicated, one per participant *(Slide 13)*
- Risk Tolerance Quiz, duplicated, one per participant *(Slide 20)*
- Financial Calculator Sites handout, duplicated, one per participant *(Slide 38)*
- Tennessee Saves brochures, enough for participants new to the sessions *(Slide 39)*

### **Lesson 5: Protecting Your Investments**

- Members of a Financial Professional Team handout, duplicated, one per participant *(Slide 9)*
- What Do the Letters Mean handout, duplicated, one per participant *(Slide 11)*
- Choosing Your Team of Financial Professionals handout, duplicated, one per participant *(Slide 13)*
- Worksheet for Selecting a Broker handout, duplicated, one per participant *(Slide 19)*
- Investment Fraud Quiz handout, duplicated, one per participant *(Slide 20)*
- Investment Fraud Quiz answer sheet, one for you *(Slide 20)*
- How to Avoid Investment Fraud handout, duplicated, one per participant *(Slide 28)*
- Investment Glossary handout, duplicated, one per participant *(Slide 39)*

- Tennessee Saves brochures, enough for participants new to the sessions (*Slide 40*)
- Easel pad lists of what participants knew and wanted to know about investing from first lesson (*Slide 41*)
- Easel pad with marker, page labeled “What I Learned” (*Slide 41*)
- Evaluation surveys, EITHER KASA OR Likert version, duplicated, one per participant (*Slide 42*)
- Pencils for filling out evaluation surveys (*Slide 42*)