



Starting Your Investment Program With \$1 to \$1000

Young Investor Worksite Education Project

Educator Workshop

May 11-12

Purple Pride Room

K-State Alumni Center

Kansas State University, Manhattan, KS

Thursday, May 11, 11:30 AM - 5:30 PM

11:30 AM Lunch

12:30 PM Overview of project, *Dena Wise & Robert Gamem*
History
Funding
Roles and responsibilities
Kansas Saves, *Carol Young*

1:00 PM Presenting the case for employee education to employers
Research updates, *Ann Berry*
Working with human resource representatives, *Dena Wise*
Marketing - agent sharing

2:15 PM Break

2:30 PM Mobilizing and leveraging community support
Presentations to civic and business groups
The Changing Workplace, *Dena Wise*
Coalitions - agent sharing
Community partnerships between financials and private businesses
Creating sales presentations
10 minute message
10 second message

4:00 PM Break

4:15 Educational methods for use with young employees
Curricula and teaching resources (Toolkit for Training)

Dinner on your own



Friday, May 12, 2006 8:00 AM to 12:00 Noon
Starting Your Investment Program With \$1 to \$1,000 Curriculum
Esther Maddux and Ann Sanders

Program Overview: Lesson Plan, Handout, PowerPoint, Teaching Tools, Evaluation for each of the ten lessons

Risk Tolerance Quiz

Case study

Participants will analyze case study, divide into 4 groups; conservative, moderately conservative, moderately aggressive, and aggressive portfolios (18-24 year old scenarios)

- 8:00 AM Lesson One: Where Do I Begin?
Lesson Two: Why Save?
Lesson Three: Which Is The Best Alternative For Me?
- 9:15 AM Break
- 9:30 AM Lesson Four: What's What In Savings and Investments? Savings
Lesson Five: What's What In Savings and Investments? Investments
Lesson Six: What's What In Savings and Investments? Retirement Plans
- 10:45 AM Break
- 11:00 AM Lesson Seven: Where Will I Place The Money I Save?
Lesson Eight: How Do I Protect My Nest Egg?
Lesson Nine: How Do I Choose A Financial Adviser?
Lesson Ten: How Do I Read the Financial Page?
- Noon Adjourn – Have a safe trip home!

Project Leaders and Training Facilitators

NASD Investor Education Foundation

Robert Gamen, Program Officer

University of Tennessee

Dena Wise, Family Economics Specialist

Ann Berry, Family Economics Specialist

University of Kentucky

Suzanne Badenhop, Family Economics Specialists

University of Florida

Elaine Courtney, Okaloosa County Extension Agent

Mary Harrison, Consumer Education Specialist

Jo Turner, Consumer Economics Specialist

Kansas State University

Carol Young, Family Financial Management Specialist

LaVonne Boetel, Senior Administrative Assistant

Ann Sanders, Graduate Teaching Assistant

Esther Maddux, Personal Financial Planning Specialist