

A.G. Edwards JA Finance Park

Sample Visit Day Schedule

(times approximate)

(10 minutes) **Opening and General Information**

- Students and teachers are given general information about the Park and the day.

(45 minutes) **The Truth Revealed—students will:**

- review key terms such as taxes and gross v. net income
- report to a business and learn their life situation: career, salary, taxes and family
- calculate their net monthly income
- compute Budget Guidelines, minimum and maximum amounts to spend on monthly expense including transportation, savings, groceries, entertainment, non-profit, health care, furniture, home improvement, clothing, housing, utilities, education, and insurance

(1 hour) **The Big Search—students will:**

- review key terms such as loans, savings, and investment
- collect option sheets for monthly expenses from each business
- acquire an investment portfolio
- record “opening” Stock Prices

(1 hour and 30 minutes) **The Budget Puzzle—students will:**

- review key terms such as balanced budget, credit, monthly payments, interest and opportunity cost
- report to their business to study collected budget options
- make final budget decisions based on their Budget Guidelines and options
- complete their Actual Budget
- record “midday” Stock Prices
- eat lunch in groups

(1 hour) **The Final Commitment—students will:**

- review key terms such as checkbook register and bill payment
- finalize decisions by making all online payments and recording in their checkbook register
- record “closing” Stock Prices
- receive a budget recap

(15 minutes) **Closing—students will:**

- review key terms such as income v. wealth and stock portfolio value
- relate key concepts to the day’s experience