

# Money Management Curriculum

## Module 8: Presentation of Financial Plans, Review Plans & Additional Topics

### Project Team:

- Ruby Ward, Professor, Utah State University
- Trent Teegerstrom, Associate Director of Tribal Extension, University of Arizona
- Karli Salisbury, Research Associate, Utah State University
- Kynda Curtis, Professor, Utah State University
- Staci Emm, Extension Educator and Professor, University of Nevada Reno
- Carol Bishop, Extension Educator and Associate Professor, University of Nevada Reno



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## Money Management Module 8: Presentation of Financial Plans, Review Plans, & Additional Topics

### Teaching Notes:

This module allows the students to present the financial plans developed throughout this course. Every student should have the opportunity to present his/her plan, even if it is not complete. This will give them the chance to receive input from their peers and help them develop a more realistic plan. Remind every student that it is important to monitor their plan continuously and to make any sort of adjustments when life events occur. Keeping an accurate plan is crucial to staying on the path to financial freedom.

There is a section in this module that can be used to bring in a speaker, touch on topics of concern that have been brought up in other modules, re-emphasize different module topics that your students might be struggling in. This section is open ended to fit the needs of your current audience.

This is the last module in the series and an important indicator of how the class went. The presentation of financial plans will be a good indicator of how much the students have learned and what areas they might be lacking. Give your students a lot of input on how to improve their plans as well as encouragement to uphold their plan for the benefit of their financial future. This is a good time to also do reflections on where they have come and future plans. This would also be a good time to do evaluations on impacts and the course.

### Educational Objectives:

- Examine financial plans for completeness and if they are realistic
- Reflect on what was taught
- Assess what their plan of action will be in the future
- COMMIT

### Discussion Topics:

- Give constructive feedback to students for presenting their financial plan
- Allow students to reflect on what they have learned from the class and what they are changing

### Resources:

- **Worksheets:** None
- **Other:** None

### Outline:

1. Present Financial Plans
  - a. Examine: Are they complete? Are they realistic?

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2. Additional Speaker or Topics – This section allows you to address areas of concern, bring in a speaker, or add any new topics that could be more relevant to you students.
3. Reflect on Progress and Next Steps
  - a. What have you learned?
  - b. What are your next steps?
  - c. Are you committed?

# Managing Money Curriculum

## Module 8: Presentation of Financial Plans

Review Plans & Additional topics



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COLLEGE OF AGRICULTURE & LIFE SCIENCES  
Cooperative Extension  
What Education Program



University of Nevada  
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### Outline

- Present Financial plans and review
- Guest speaker additional resource exploration
- Reflect on personal progress and the steps ahead

**Slide 3:** This module is important because it will allow you to see the progress that your students have made, and give feedback to help them fine tune their budgets.

## Present and Review Plans

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- Examine plans for
  - Completeness: Is there other things it should contain?
  - Realistic: What suggestions would you have?

**Slide 4:** Chances are that students have different starting points in the curriculum, some may be further ahead than others in completing their budgets. It may be helpful to present what they have, even if it is not complete. The feedback received may help them refine and complete their plan.

This slide has some things to look for in a plan. They should also have methods of monitoring their progress.

This is a good place to encourage their progress and provide feedback to help them refine/complete their plans.

## Additional Topic / Speaker

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**Slide 5:** This section is to allow flexibility in either bringing in a guest speaker to talk about resources or opportunities. This could also be where you explore and present information on local resources available and how to access them.

Ideas for guest speakers include training programs to get better jobs, workforce services, etc.

## Reflect on Progress and Next Steps

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- What have you learned?
- How comfortable are you with your plan?
- What are your next steps?
- Are you committed?

**Slide 6:** This is where you will really see how much they have learned and whether they are committed to making changes.

You might also ask them, what has happened or what changes they have already made?

You might also ask them, what they expect to happen as they follow their plan?



**Thank you!**