

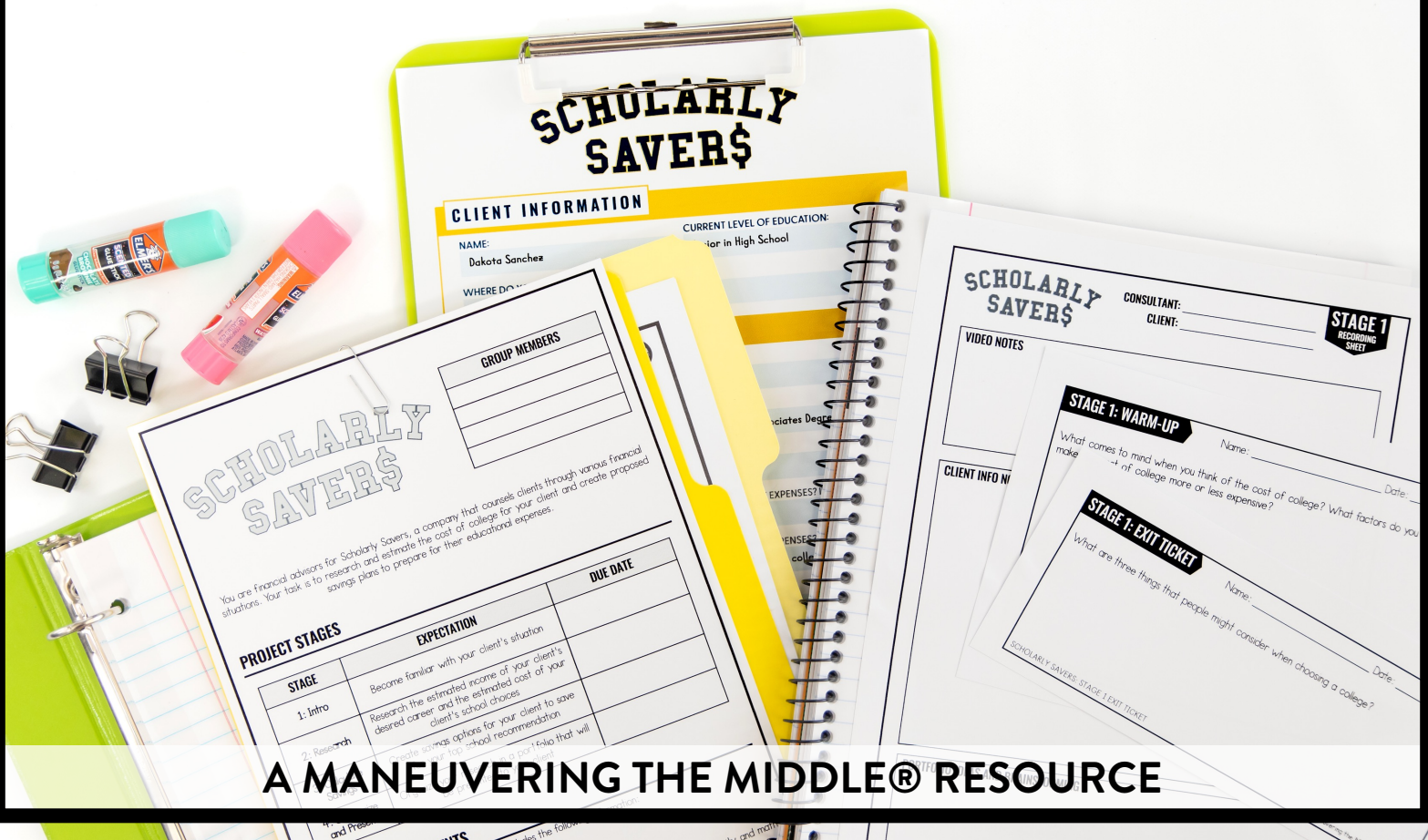
FINANCIAL LITERACY collaborative project

8th
GRADE

CCSS: MP1, MP4 | TEKS: 8.12G, 8.12C

The problem: You are a financial advisor for Scholarly Savers, a company that counsels clients through various financial situations. Your task is to research and estimate the cost of college for your client and create proposed savings plans to prepare for their expenses.

The investigation: Students will research and understand the estimated cost of college as well as develop a plan to save over time for college expenses.



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FINANCIAL LITERACY

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TIME FRAME: 4-7 DAYS

SCHOLARLY SAVER\$

CLIENT INFORMATION

NAME: Mikayla Edmundson

CURRENT LEVEL OF EDUCATION: Junior in High School

WHERE DO YOU LIVE? (CITY, STATE)
Denver, Colorado

COLLEGE PLANS

WHAT DO YOU PLAN TO STUDY OR MAJOR IN?
Animal Sciences

WHAT LEVEL OF EDUCATION DO YOU PLAN TO PURSUE?
I plan to attend a 2-year program in order to obtain an Associates Degree.

WHAT IS YOUR ANTICIPATED CAREER?
Veterinarian Technician

DO YOU HAVE COLLEGE EXPENSES? IF YES, HOW MUCH?

how is this
project
organized?

materials needed:

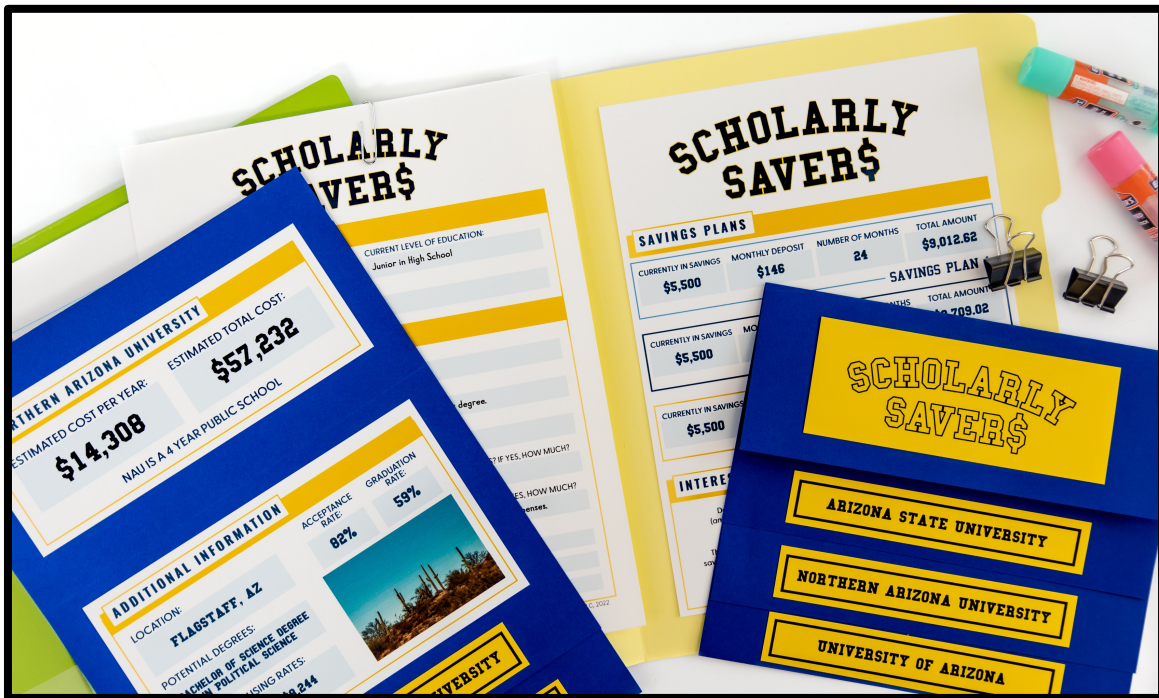
computer
+ internet access

STAGE	DESCRIPTION	TIME FRAME
1: Intro	This stage will introduce students to the project scenario and allow students to become familiar with their client.	1 day
2: Research	Students will first research the estimated salary of their client's desired career as well as the estimated expenses and financial aid amounts at the client's top school choices.	1-2 days
3: Calculate Savings	Students will use an online simple savings calculator to create savings plans options for their top school recommendation.	1-2 days
4: Summarize and Present	Students will organize their estimations of costs and savings plans by creating a portfolio to present to their client.	1-2 days

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WHAT IS THE FINISHED PRODUCT?



**SCHOLARLY SAVERS
8TH GRADE PROJECT RUBRIC**

Name _____
Total Points _____

	ABOVE STANDARD
MATHEMATICAL CONTENT	Estimates college costs and creates savings plans without errors 40 points
MATHEMATICAL THINKING	Provides appropriate reasoning for college and saving recommendations 15 points
PARTICIPATION	Participates fully 15 points
FOLLOWS TEACHER INSTRUCTIONS AND PROJECT CRITERIA	Follows directions and criteria fully 15 points
FINAL PRODUCT	Final product is well organized and includes all required details 15 points

**SCHOLARLY SAVERS
8TH GRADE PROJECT RUBRIC**

Name _____
Date _____ Pd _____

PROJECT RUBRIC

	ABOVE STANDARD	MET STANDARD	BELOW STANDARD
MATHEMATICAL CONTENT	Estimates college costs and creates savings plans without errors 40 points	Estimates college costs and creates savings plans with few errors 30 points	Estimates college costs and creates savings plans with multiple errors 20 points
MATHEMATICAL THINKING	Provides appropriate reasoning for college and saving recommendations 15 points	Provides some reasoning for college and saving recommendations 10 points	Does not provide reasoning for college and saving recommendations 5 points
PARTICIPATION	Participates fully 15 points	Participates with minor redirects from teacher 10 points	Participates with major redirects from teacher 5 points
FOLLOWS TEACHER INSTRUCTIONS AND PROJECT CRITERIA	Follows directions and criteria fully 15 points	Follows directions and criteria with few errors 10 points	Follows directions and criteria with multiple errors 5 points
FINAL PRODUCT	Final product is well organized and includes all required details 15 points	Final product is somewhat organized and includes most required details 10 points	Final product lacks organization and is missing several required details 5 points

TEACHER NOTES:

TOTAL POINTS:

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rubrics are
provided to
streamline
grading



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PLANNING IS DONE FOR YOU

STAGE 2 - RESEARCH TEACHER INSTRUCTIONS

8th

STAGE OUTLINE

The table below provides a suggested outline for this project stage. The accompanying slide deck follows the outline shown.

STAGE 2 - RESEARCH (Estimated time: 1-2 days)	
WARM-UP	<ol style="list-style-type: none">1. Give each student a Stage 2: Warm-up sheet to answer the following: "Which do you think is more important to consider first: the type of career you'd like to pursue, or the college you'd like to attend? Explain your choice."2. Provide each student with a Stage 2: Recording Sheet.3. Watch the "How to Pay for College (The Right Way)" clip. Encourage students to take notes on what they may agree or disagree with from the clip. https://www.youtube.com/watch?v=Hh9lor8GLFc
MINI-LESSON	<ol style="list-style-type: none">4. Inform your students that as employees at Scholarly Savers, they will attend a "Paying for College" training session. Use the accompanying slide deck to lead students through different college costs and methods of paying for college. Note: The accompanying slide was designed to be flexible. Consider the following options for the mini-lesson:<ol style="list-style-type: none">a. Teacher describes the different methods and students take notesb. Students e(Suggestecc. A guidance
STAGE 2: STEPS	<ol style="list-style-type: none">5. Students will reco6. Students will rese7. Students should c <p>Note: Please know th</p>
EXIT TICKET	<ol style="list-style-type: none">8. Give each student <p>"What did you fir</p>

each of the four
stages includes
teacher
lesson plans



PAYING FOR COLLEGE 101

The following are common methods used to help pay for college expenses:

SCHOLARSHIPS

GRANTS

WORK-STUDY

LOANS

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and a slide deck to
present the material



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EVERYTHING YOU NEED TO KEEP
STUDENTS ON TRACK

STAGE 2: EXIT TICKET

Name: _____ Date: _____

What did you find most interesting in your research? What factors most influenced your top college recommendation for your client?

SCHOLARLY SAVERS: STAGE 2 EXIT TICKET

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✓ student materials

✓ warm-ups

✓ exit tickets

STAGE 2: EXIT TICKET

Name: _____

What did you find most interesting in your research? What factors most influenced your top college recommendation for your client?

SCHOLARLY SAVERS: STAGE 2 EXIT TICKET

STAGE 2: WARM-UP

Name: _____ Date: _____

Which do you think is more important to consider first: the type of career you'd like to pursue, or the college you'd like to attend? Explain your choice.

SCHOLARLY SAVERS: STAGE 2 WARM-UP

STAGE 2: EXIT TICKET

Name: _____

What did you find most interesting in your research? What factors most influenced your top college recommendation for your client?

SCHOLARLY SAVERS: STAGE 2 EXIT TICKET

STAGE 2: WARM-UP

Name: _____

Which do you think is more important to consider first: the type of career you'd like to pursue, or the college you'd like to attend? Explain your choice.

SCHOLARLY SAVERS: STAGE 2 WARM-UP

SCHOLARLY SAVERS\$

CONSULTANT: _____
CLIENT: _____

STAGE 2 RECORDING SHEET

VIDEO NOTES

SCHOLARSHIPS

GRANTS

WORK-STUDY

LOANS

CLIENT CAREER NOTES

SCHOLARLY SAVERS: STAGE 2 RECORDING SHEET

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