



Financial Planning

[General Course Information](#)

[Power Standards](#)

[Unit I: unit name](#)

[Unit II:](#)

[Unit III:](#)

[Unit IV:](#)

[Unit V:](#)

[Unit VI:](#)

[Unit VII:](#)

[Unit VIII:](#)

General Course Information

| Financial Planning | |
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| Department: Business and Marketing | Grade Level(s): 11-12 |
| Duration/Credits: 1 sem/.5 credit | Prerequisites: Successful Completion of Personal Finance |
| BOE Approval Date: | Course Code H5405W |
| Course Description: | |
| <p>Financial Planning expands on the concepts introduced in Personal Finance to give students a more in depth look at their financial future. Students will learn strategies to build lifelong financial wealth and security. Topics include investing, estate planning, tax planning, and understanding financial literacy. Financial Planning is the course for students interested in a strong financial future. Students may have the opportunity to earn three college credit hours from the University of Missouri-St. Louis. Students enrolled in Financial Planning are eligible to join a student business organization (FBLA).</p> | |
| Course Rationale: | |
| <p>All individuals and families encounter financial planning issues and problems. Students in Financial Planning will gain a clearer focus on the dynamics of the personal financial planning process and the concepts, tools and techniques used to implement this process.</p> | |
| Course Objectives: | |
| <p>The student will read about and research financial issues to have a clear understanding of personal financial statements and the importance of maintaining an accurate set of financial statements for themselves. (A+ Reading)</p> <p>The student will research the methods used in managing cash and how to use that knowledge in making major purchases. (A+ Research)</p> <p>The student will read and discuss the basics of credit and the lifelong impact of credit.</p> <p>The student will research personal risk management tools and speak about the means available to shift those risks through insurance while understanding that some risk should be avoided and retained.</p> | |

The student will discuss investment strategies to demonstrate an understanding of investments and the strategies used to manage investments. (A+: Speaking and Listening)

The student will describe in writing and make a formal oral presentation on their evaluation of retirement and estate planning techniques. (A+: Writing)

Standards Alignment:

List standard set(s) to which course has been aligned

Power Standards

List Standards -

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|-------------------------------------------------------|----------------------------------------------------------------------|
| Unit I: unit name | Duration: |
| Unit Description: | |
| Unit Standards | Key Learning Targets |
| Insert unit standards | I can . . . Insert learning targets |
| Essential Questions | Enduring Understandings |
| Students will consider: Insert essential questions | Students will understand that: Insert enduring understandings |
| Resources: | |
| Previous knowledge and skills needed: | |
| Key Unit Vocabulary: | |
| Additional Information: | |

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|----------------------------------------------|--------------------------------|
| Unit II: | Duration: |
| Unit Description: | |
| Unit Standards | Key Learning Targets |
| Insert unit standards | Insert learning targets |
| Essential Questions | Enduring Understandings |
| Insert essential questions | Insert enduring understandings |
| Resources: | |
| Previous knowledge and skills needed: | |
| Key Unit Vocabulary: | |
| Additional Information: | |

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| Unit III: | Duration: |
| Unit Description: | |
| Unit Standards | Key Learning Targets |
| Insert unit standards | Insert learning targets |
| Essential Questions | Enduring Understandings |
| Insert essential questions | Insert enduring understandings |
| Resources: | |
| Previous knowledge and skills needed: | |
| Key Unit Vocabulary: | |
| Additional Information: | |

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| Unit IV: | Duration: |
| Unit Description: | |
| Unit Standards | Key Learning Targets |
| Insert unit standards | Insert learning targets |
| Essential Questions | Enduring Understandings |
| Insert essential questions | Insert enduring understandings |
| Resources: | |
| Previous knowledge and skills needed: | |
| Key Unit Vocabulary: | |
| Additional Information: | |

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| Unit V: | Duration: |
| Unit Description: | |
| Unit Standards | Key Learning Targets |
| Insert unit standards | Insert learning targets |
| Essential Questions | Enduring Understandings |
| Insert essential questions | Insert enduring understandings |
| Resources: | |
| Previous knowledge and skills needed: | |
| Key Unit Vocabulary: | |
| Additional Information: | |

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| Unit VI: | Duration: |
| Unit Description: | |
| Unit Standards | Key Learning Targets |
| Insert unit standards | Insert learning targets |
| Essential Questions | Enduring Understandings |
| Insert essential questions | Insert enduring understandings |
| Resources: | |
| Previous knowledge and skills needed: | |
| Key Unit Vocabulary: | |
| Additional Information: | |

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| Unit VII: | | | Duration: |
| Unit Description: | | | |
| Unit Standards | | | Key Learning Targets |
| Insert unit standards | | | Insert learning targets |
| Essential Questions | | | Enduring Understandings |
| Insert essential questions | | | Insert enduring understandings |
| Resources: | | | |
| Previous knowledge and skills needed: | | | |
| Key Unit Vocabulary: | | | |
| Additional Information: | | | |

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| Unit VIII: | | | Duration: |
| Unit Description: | | | |
| Unit Standards | | | Key Learning Targets |
| Insert unit standards | | | Insert learning targets |
| Essential Questions | | | Enduring Understandings |
| Insert essential questions | | | Insert enduring understandings |
| Resources: | | | |
| Previous knowledge and skills needed: | | | |
| Key Unit Vocabulary: | | | |
| Additional Information: | | | |