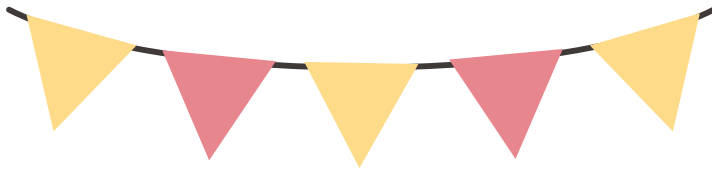


# L<sub>essons in</sub> F<sub>inancial</sub> L<sub>iteracy</sub>



**Mission: to educate kids about financial literacy & FBLA through exciting presentations and activities!**



**Anvi Bhate**  
**Phillips Exeter Academy**

▪ *questions? contact me at [abhate@exeter.edu](mailto:abhate@exeter.edu) or +1 781-354-0753!* ▪

# ABOUT ME



Hi everyone! I'm Anvi Bhate and I'm a rising senior at Phillips Exeter Academy. When not in school, I live in Lexington, MA, but I really grew up in Bangalore, India. At school, I'm very passionate about Debate, Science, and Journalism (I especially love being Editor-in-Chief of our school's exciting Economics magazine, Equilibrium!) For fun, I love to play the guitar, spend time with friends, go running and hiking, and play cards or board games. Of course, like you, I'm also very passionate about Economics and Business – not only the fields themselves, but also ensuring everyone has equal access to, knowledge of, and benefits from them.

## INTRO TO THE PROJECT!

These past two years, my friends and I have been teaching Financial Literacy lessons at our local elementary school. We ran through many introductory topics – ones we thought they would need to know because their school didn't provide any kind of financial education. Examples were teaching them the types and values of different coins, or teaching them about saving and spending, and the difference between needs and wants. For me, the best part of these lessons was that I got to spend time with little kids and hear their views on these things. Each time, I was surprised with the amount they knew and the level of curiosity and excitement with which they approached the topics. That's why I chose to do this project: because in my mind, not only will it help the school or organization you choose to work with by advancing their financial literacy and knowledge, it can also be a pleasant refresher for you, all the while raising awareness about FBLA and potentially increasing membership.



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# HOW YOU CAN GET INVOLVED:

1

**CREATE** a lesson presentation about financial literacy: presentation topics can include types of coins, saving, credit vs. debit, your creative ideas, etc.! Example below\*

2

**CONNECT** with a local organization to teach at and set up a regular cadence; this is not limited to elementary school - can be middle or high school, an old age home, or some other local community that needs it

3

**POST** about the basics of financial literacy or statistics about worldwide lack of financial literacy on your FBLA chapter's instagram; raise awareness!

4

**TEACH** at your local organization, whether about financial literacy, investing, or FBLA!

5

**DESIGN** an investment simulator for older audiences, & teach middle/high schoolers about investing + the stock market with a fun simulator game, example below\*

6

**PROMOTE FBLA** by creating an outreach presentation about FBLA to present to your local orgs, or sharing an FBLA outreach post on your chapter Instagrams

7

Invite speakers to your chapter/the local organization, hold an FBLA booth at your school, or **GET CREATIVE!**

\*IMPORTANT Links: Saving Lesson Presentation Example [here](#), Stock Market Game Example [here](#)

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# POINT DISTRIBUTION

|  | POINTS EACH                               | POINTS EARNED | DESCRIPTION |
|--|---|---------------|-------------|
| Social media:<br>financial literacy/<br>FBLA outreach post                             | <b>10</b><br>points per post              |               |             |
| Connect w/ a local<br>organization + set up<br>regular cadence                         | <b>15</b><br>points                       |               |             |
| Create an FBLA<br>outreach<br>presentation   | <b>25</b><br>points                       |               |             |
| Create a lesson<br>presentation  | <b>35</b><br>points                       |               |             |
| Create an<br>investment<br>simulator game  | <b>35</b><br>points                       |               |             |
| Every lesson taught<br>OR every lesson<br>during simulator<br>game run @ local<br>org. | <b>50</b><br>points/lesson                |               |             |
| Your own idea(s)!  | <b>Varies</b><br><i>(Ask for details)</i> |               |             |
| <b>TOTAL</b>   |   |               |             |

\*Points are earned per capita, due to varying chapter sizes.

\*\*Project deadline is **March 6th, 2024**. Top 3 chapters will earn extra Gold Seal Chapter points!

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