

# LESSON PLAN

Version 1.0

<b>Date:</b>	<b>Class:</b>	<b>Unit:</b>
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<b>LESSON TOPIC:</b>	<b>Strategies to Invest</b>
<b>AIM:</b>	Identify some different investment strategies and when to use them
<b>OBJECTIVES:</b>	Students will be able to: <ul style="list-style-type: none"><li>- Think globally about the cause and effects of world events on the US stock market?</li><li>- Understand different investment strategies</li><li>- Re-enforce diversified portfolios</li></ul>
<b>MINI-LESSON:</b>	Student identify: <ul style="list-style-type: none"><li>- Create a list of 5 or more non-business events in the US or around the world that can affect the US stock market. Think Globally. State the cause and effect of each event. (IE War in middle east, US gas goes up)</li></ul>
<b>MAIN ACTIVITY:</b>	<ol style="list-style-type: none"><li>1) Divide class into teams. Each team will create a diversified stock portfolio for one of the following examples:<ol style="list-style-type: none"><li>a. Single young professional - 25-30 years old</li><li>b. Middle aged married family with 3 kids</li><li>c. Single 62 yr old with 3 more years to retirement</li></ol></li><li>2) Play game in family mode, read cards aloud. Have students land on retirement party and go thru the diagonal to retire.</li></ol> <p>*Recommendations - (1) Teacher should review game rules and components prior to class. (2) Teacher can set up game to have all players ready to retire. Have students land on retirement party and go thru the diagonal to retire.</p>
<b>CLOSING:</b>	<ul style="list-style-type: none"><li>- Discuss why your investment strategy might change</li><li>- Discuss which stocks would be bad based on the diagonal square</li></ul>
<b>ASSESSMENT:</b>	Students divide into teams - Create a list of 5 or more non-business events in the US or around the world that can affect the US stock market. Think Globally. State the cause and effect of each event. (IE War in middle east, US gas goes up)
<b>MODIFICATIONS:</b>	To be determined as needed by teacher.
<b>MATERIALS:</b>	\$tock Exchange Game, Stock Market section of the business newspaper
<b>TECHNOLOGY:</b>	Internet access (optional)