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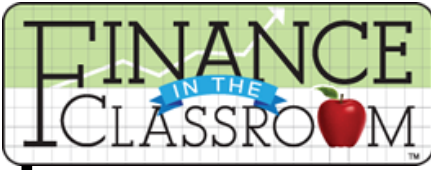
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INTRODUCTION

Welcome to
Finance in the Classroom

This Tool Kit *nails down* everything you need to teach kids about money. Finance in the Classroom is fun, easy **and** essential!

Fun

Books, songs, videos, bulletin boards, power points, great lessons – it’s all here to make teaching about money fun.

Easy

The work is already done. When you access the Finance in the Classroom website just click on your grade level and subject area and choose a lesson tied to existing standards.

Essential

Kids love money, kids love talking about money, kids love spending money. It’s never too early to teach kids about money and basic economics. Now more than ever students need to be prepared to navigate through their financial future. It’s essential kids learn the power and pitfalls of money management.



Integrated Lessons

Teacher Task List

Here are some step-by-step instructions to guide you through implementing the Finance in the Classroom (FITC) program. It is essential to teach some lessons that integrate financial learning into the core areas of Mathematics, Social Studies and Language Arts. The FITC website makes it easy to find lessons for your grade level that are aligned to the new Common Core standards. If you choose, you can incentivize students by also using the Passport Program, see page 6.

- | | <u>Completion Date</u> |
|---|------------------------|
| <input type="checkbox"/> Understand the need for financial education
(see <i>About Us</i> on FITC website) | _____ |
| <input type="checkbox"/> Attend training or take the online course
(see <i>Professional Development</i> on FITC website) | _____ |
| <input type="checkbox"/> Read the <i>Frequently Asked Questions (FAQ)</i> on FITC website | _____ |
| <input type="checkbox"/> Send Introductory Letter as desired to Principal, Curriculum Director, PTA
(see page 4) | _____ |
| <input type="checkbox"/> Review grade level requirements
(see <i>Scope and Sequence</i> on FITC website) | _____ |
| <input type="checkbox"/> Create a FITC plan: | _____ |
| <input type="checkbox"/> Which lessons will be used in each core area | |
| <input type="checkbox"/> When lessons will be taught | |
| <input type="checkbox"/> Determine how the community and parents will be involved
(see parent correspondence on page 12 and community correspondence on page 9) | |
| <input type="checkbox"/> Choose an incentive (see page 5) | |
| <input type="checkbox"/> Determine how the Passport Program will be used
(see following Passport Checklist on page 6) | |
| <input type="checkbox"/> Set completion date for At-home/Community activity | |
| <input type="checkbox"/> Carry out FITC plan | _____ |
| <input type="checkbox"/> Re-enforce concepts when possible | _____ |
| <input type="checkbox"/> <i>Like</i> Finance in the Classroom on Facebook for updates | _____ |



Dear {PRINCIPAL/CURRICULUM DIRECTOR/PTA}:

I recently attended a Finance in the Classroom (FITC) workshop and I am planning to implement the program in my classroom this year. FITC was co-created by USOE and UEN. The Program ties existing standards in Math, Social Studies and Language Arts to financial and economic concepts.

The website, **financeintheclassroom.org**, has comprehensive resources including lessons, games, activities and more that can be used by teachers at all grade levels. The program also includes a Financial Literacy Passport which students earn by completing in-class lessons and an at-home activity.

Please let me know if you want more information about the FITC Program or training.

Sincerely,
{TEACHER}

Passport Incentive Ideas

Secure incentives from your local community and parents to encourage student participation and Passport completion.

School

- Give *Get-out-of-homework* or *Long-recess* passes
- Highlight Passport earners on a bulletin board
- Arrange a class visit with *Mascot Bill* to present certificates and take pictures
- Hold a special assembly or ceremony to present certificates
- Align with existing school recognition programs
- Include on resumes, portfolios, scholarship applications (high schools)
- Other

Community

- Grocery/convenience stores (gift certificates, pizza parties, ice cream day)
- Banks/credit unions (savings account starters, iPods, piggy banks)
- Movie theaters (tickets, concessions, early entrance)
- Restaurants (gift certificates, coupons, discounts)
- Cash drawings
- Utah Educational Savings Plan 529 Plan starter investment
- Other

Home

- Get-out-of-chores* pass
- Bonus allowance
- Bonus or matching savings deposit
- Special day with mom, dad, grandparent or friend
- Favorite dinner night
- Extended curfew night
- Other



WHERE DO I START?

Teacher Task List

The Passport Program can be used to incentivize students and track their progression in learning about personal finances. You can find a printable Passport and Passport Certificate at the top of each grade level page on the *Finance in the Classroom* website. These pages are customizable.

Passport Program

	<u>Completion Date</u>
<input type="checkbox"/> Enter activities/lessons on the Passport	_____
<input type="checkbox"/> Prepare/print hard copy of Passport or use electronically	_____
<input type="checkbox"/> Distribute Passport to parents	_____
<input type="checkbox"/> Identify students who earned a Passport Certificate (Those who have completed activities in Math, Language Arts, Social Studies and At-Home activity)	_____
<input type="checkbox"/> Prepare/print Passport Certificates	_____
<input type="checkbox"/> Present student with Passport Certificate	_____

Optional steps to enhance Passport experience

<input type="checkbox"/> Take and submit pictures of activities and recognition	_____
<input type="checkbox"/> Secure community support for incentives and recognition	_____
<input type="checkbox"/> Plan student recognition (assembly, class party, community sponsored activity)	_____
<input type="checkbox"/> Write and submit PR piece for local Media	_____
<input type="checkbox"/> Complete online form and submit to Julie Felshaw (Julie.Felshaw@schools.utah.gov)	_____



{DATE}

Dear {ORGANIZATION},

This year {SCHOOL} is taking up the challenge to help its students learn more about money by earning their Utah Financial and Economic Literacy Passports. As you may already be aware, the Utah State Legislature has directed public schools to help students become more financially savvy through the Utah K-12 Financial and Economic Education Integration and Passport Program.

This Program provides for classroom instruction followed by at-home activities. After students complete both in-class and at-home work they will be recognized with a Passport Certificate.

I am writing to ask you to support our students as they strive to earn their Passports. For just \$_____ per class you can make a positive impact on their futures. In return, {ORGANIZATION} will be recognized via a press release to local media, announcements on social media, www.financeintheclassroom.org and {SCHOOL'S URL} and the opportunity to personally present the students with their Passport Certificates during a school assembly.

If you'd like to support {SCHOOL} with a donation, please complete and submit the attached form. I will follow up with you to discuss this opportunity further. Thank you!

Sincerely,

{PRINCIPAL NAME}

Principal

{SCHOOL NAME}



COMMUNITY RESPONSE FORM

Yes! _____ would like to support the students at {SCHOOL} on their journey to financial and economic understanding.

Suggestions:

- \$2 per student for a recognition party for students who earn Passports
- \$25 for a drawing
- Tickets to movies or local events
- Coupons for treats
- Other _____

Yes! A donation is included. (Please make checks payable to {SCHOOL}.)

Yes! Please send an invoice.

Organization _____

Contact Person _____

Address _____

City, State, Zip _____

Phone # _____ Email: _____

We appreciate your support.

{TEACHER}
{SCHOOL}
{SCHOOL ADDRESS}
{CITY, STATE, ZIP}
{PHONE AND FAX}
{EMAIL}



{DATE}

Dear {ORGANIZATION},

Thank you for your support of {SCHOOL'S} financial education efforts. With your support {NUMBER OF STUDENTS} students were recognized with Financial & Economic Education Passport Certificates.

Enclosed please find {SEE SUGGESTIONS BELOW}.

We value community partnerships and look forward to working with you in the future.

Sincerely,

{SIGNATURE}

{PRINCIPAL/TEACHER NAME}

{TITLE}

{SCHOOL NAME}

SUGGESTED ENCLOSURES

- a picture of our class
- a picture with Mascot Bill
- sample passport certificate
- notes written by students
- other



{DATE}

Dear Parent/Guardian,

You know about the basics: reading, writing and arithmetic, but did you know that the Utah State Legislature has directed schools to help our students become more financially and economically literate? In addition to the existing required General Financial Literacy course for 11th and 12th grade students, a K-10 integrated approach is now in legislation.

We, at {SCHOOL NAME}, feel it is vital to bring these critical skills to our students as we guide them through their educational career and lead them toward a successful adulthood.

Finance in the Classroom (FITC) is an incredible website and much more! The FITC Program brings parents, teachers and community together to provide financial education for Utah students, by integrating it into the already existing Common Core. FITC encourages skilled teaching in the classroom, supported by additional financial and economic activities at home and in the community. Student learning is promoted through fun, yet sound lessons resulting in student recognition through the Financial and Economic Literacy Passport Program.

Students can be recognized for their new financial knowledge by earning a Financial and Economic Literacy Passport which is explained on the Finance in the Classroom website. A Passport can be earned at each grade level.

We strongly encourage you to be involved in this initiative and help your student earn his/her Passport. Learn more by visiting the *Parent Resources* section on financeintheclassroom.org.

Sincerely,

{PRINCIPAL/TEACHER}

{SCHOOL}



{DATE}

Dear Parent/Guardian,

Recently a letter was sent explaining the Finance in the Classroom Program (FITC) implemented in our class this year. The students were introduced to {financial topics, such as credit, savings}. Students can be recognized for their new financial knowledge by receiving a Financial and Economic Education Passport. Earning a Passport requires in-class lessons as well as an at-home activity.

They have now completed in-class lessons and now are ready to do an At-home/Community activity to meet the Passport requirements. Reinforce this learning by completing one of the following activities:

- {Enter option 1}
- {Enter option 2}
- {Enter option 3}

Once you have completed one of these options, please fill out, sign and return the passport to me by {DATE}. You student will then receive a Passport Certificate. {Include optional information about Passport presentation/incentives/rewards.} For more information visit financeintheclassroom.org.

Thank you for your support.

Sincerely,

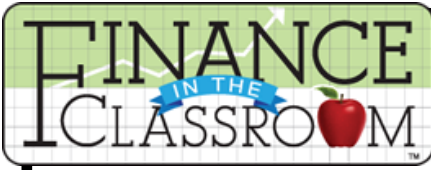
{PRINCIPAL/TEACHER}

{SCHOOL}

Contact: {PRINCIPAL}

{SCHOOL}

{PHONE NUMBER}



{EMAIL}

Teachers Prepare to Talk Money to Students

{CITY,} UT, {DATE}—{TEACHER NAME}, {DISCIPLINE/GRADE LEVEL} teacher at {SCHOOL} is now prepared to teach students about money. {TEACHER} recently completed a professional development course featuring Finance in the Classroom (FITC). The training consisted of hands-on activities, lesson demonstrations and website review.

Finance in the Classroom is the comprehensive tool teachers are using to provide financial education. FITC was developed by the Utah State Office of Education and the Utah Education Network. This incredible program brings parents, teachers and community together to provide a strong financial education base for Utah students.

{TEACHER LAST NAME} says, {"FINANCIAL SAVVY HAS NEVER BEEN MORE CRITICAL THAN IT IS TODAY. IF I CAN HELP EVEN ONE STUDENT REALIZE THE IMPORTANCE OF RESPONSIBLE MONEY MANAGEMENT AND KEEP THEM FROM GETTING INTO FINANCIAL TROUBLE LATER IN LIFE THEN IT'S WORTH IT."}

Created to fulfill a Utah State Legislative directive, FITC encourages skilled teaching in the classroom supported by additional activities at home or in the community. Learning is promoted through fun, yet sound lessons resulting in student recognition through the Passport Program.

Julie Felshaw, Financial/Economic Education Specialist at the Utah State Office of Education, has been an advocate from the beginning. "Teachers are finding Finance in the Classroom to be a comprehensive tool. It's an incredible program that brings parents, teachers and community together to provide a strong financial education base for Utah students," she said.

Teachers wishing to learn more about the Finance in the Classroom Program can visit www.financeintheclassroom.org or take the online Professional Development course beginning 2012-2013 school year.

Finance in the Classroom helps Utah's dedicated K-12 teachers effectively incorporate financial and economic concepts into their instruction. Comprehensive online resources include videos, Power Points, books, etc. Visit www.financeintheclassroom.org for more information.

-END-

Contact: {TEACHER/PRINCIPAL NAME}
{SCHOOL NAME}
{PHONE NUMBER}



[{EMAIL}](#)

Students Earn Financial and Economic Passports To Travel Through the World of Money

{CITY,} UT, {DATE}—{STUDENT NAME}, {STUDENT NAME} and {STUDENT NAME}, students at {SCHOOL NAME}, have earned their Utah Financial and Economic Literacy Passports.

Students learned about {SAVING, CREDIT AND IDENTITY THEFT}. After completing classroom work and an at-home activity, they received a Passport Certificate. Financial and Economic Passports are available at the elementary, middle school/junior high, and high school levels. The capstone experience is the high school financial literacy course required for graduation.

{STUDENT LAST NAME}, who earned {HIS/HER} {GRADE LEVEL} Passport, says, {"IT WAS FUN TO GET MY FAMILY INVOLVED IN THE AT-HOME PROJECT. OUR CHALLENGE WAS TO BECOME MORE PRODUCTIVE. WE EACH CAME UP WITH AN IDEA OF HOW WE COULD SAVE TIME OR MONEY."}

Finance in the Classroom (FITC) is the comprehensive tool teachers are using to provide financial education. FITC was developed by the Utah State Office of Education and the Utah Education Network. This incredible program brings parents, teachers and community together to provide a strong financial education base for Utah students.

Julie Felshaw, Financial/Economic Education Specialist at the Utah State Office of Education, has been an advocate from the beginning. "The passport will enhance student learning throughout the K-12 experience and prepare students for the required high school graduation course," she said.

Finance in the Classroom was created to fulfill a Utah State Legislative directive integrating financial education with K-12 core areas. FITC encourages skilled teaching in the classroom supported by additional activities at home or in the community. Learning is promoted through fun, yet sound lessons resulting in student recognition through the Passport Program. Visit www.financeintheclassroom.org for more information.

-END-



Newsletter Articles

Let others know the great work you are doing. These brief articles can be submitted to school, district or PTA newsletters.

To announce launch of activity:

{GRADE} students in {TEACHER}'s class at {SCHOOL} will be doing the Finance in the Classroom program this {TIME PERIOD}. Using the {LESSON/RESOURCE/ACTIVITY} they will learn about {THE FINANCIAL CONCEPT TO BE COVERED}. The website, financeintheclassroom.org, has ready-to-use lessons for Math, Social Studies, and Language Arts for each grade level.

After completion of activity:

{NUMBER OF STUDENTS WHO EARNED PASSPORTS} {GRADE} students in {TEACHER}'s class at {SCHOOL} earned Financial and Economic Literacy Passports by completing in-class and at-home activities that taught them about money. Financial and Economic Literacy Passports are part of the Finance in the Classroom Program. All teachers can access this fun and easy program at financeintheclassroom.org.

SUGGESTED INCLUSIONS:

- Picture of your students doing activities
- Picture of your students getting Passports
- Picture of a book jacket read in class
- Sample Passport or Passport Certificate
- Picture of students with community partner or *Mascot Bill*

“LIKE”

Finance in the Classroom On FACEBOOK!



HOW:

- Step 1: Log on to FACEBOOK
- Step 2: Search “Finance in the Classroom”
- Step 3: Click the “like” button to the right of the title

WHY:

- Get reminders about the Finance in the Classroom Program
- Find out about additional teacher trainings
- Know about Personal Finance Month and national financial news
- Share best practices and your favorite money lessons
- See pictures of yourself or friends attending trainings

WE “LIKE” YOU, TOO!



Mission

To improve the personal financial literacy of Kindergarten through college-age youth by providing advocacy, research, standards, and educational resources. We strive to prepare youth for life-long successful financial decision-making.

How Jump\$Start Helps Teachers

- Teacher Training Summit**
- Awards for excellence in financial teaching**
- Student scholarships**
- Advocacy in the community and with government**
- Teaching resources**

utahjumpstart.org