

ADOPT-A-SCHOOL PROGRAM



Spread financial literacy throughout your community by supporting a school near you!

Monthly Cashflow
INCOME \$3,453
EXPENSES \$3,042

NET WORTH + 8.14%

PHONE BILL PAYMENT DUE

CREDIT SCORE 632

MONTHLY BUDGET

NET WORTH + 8.14%

NFLX 1.38% 3.84
MSFT -0.84% 1.7

TRADE

INCOME QUIZ

9 weeks

PERSONAL BUDGETING GAME

VIRTUAL STOCK MARKET GAME

STANDARDS ALIGNED CURRICULUM

EASY TEACHER REPORTING

FALL 2023 TEACHER SURVEY

97.8% of teachers feel using PersonalFinanceLab® has improved their students' understanding of basic financial literacy

CONTACT US

1-800-786-8725
sales@PersonalFinanceLab.com
www.PersonalFinanceLab.com

The Budget Game

REAL-LIFE SCENARIOS WITH CONSEQUENCES

An engaging learning experience that develops your students' life skills.

Bring the Budget Game to life YOUR way!

What's Included

- 12+ virtual game months
- 21 in-game financial literacy lessons
- Interactive mini-games
- Interactive apartment to view living conditions
- Realistic bank and credit card statements
- Customize income and bills to your local area
- Detailed reports on student progress
- Recommended class activities, lesson plans and grading rubrics on personal finance topics.



OBJECTIVES

The goal of the game is to build an emergency savings fund with monthly savings targets.

Students learn how to make responsible buying decisions that balance their needs vs their wants. They are encouraged to purchase products and services that foster a higher quality of life.

Students progress through 12 virtual months of the game. Each month takes about 20 minutes to complete. Every few days there are pop-up Life Event cards with unplanned expenses. This puts pressure on their budget, so they realize the importance of planning ahead!

STUDENTS LEARN

Setting and Keeping Savings Goals

Our game focuses on how to build a budget and maintain savings goals. The scenarios are realistic so students are ready to face them in the real world. We emphasize building an emergency savings fund early and to pay yourself first.

They earn the most points by saving at least 10% of their income every month.

Realistic Choices with Long-Term Impact

Students will be faced with hundreds of spending decisions over the course of the game. Every decision has long-term consequences on how the game plays out.

This gives each student a unique path in contrast to the rest of their class.

What an excellent way to start class discussions!

Students Manage Credit Cards and Build Their Credit Scores

Most budgeting games are focused on savings only, which is unrealistic. In the PersonalFinanceLab® Budget Game, students learn about balancing needs vs wants, and how to use credit responsibly to build their credit score. They can also learn the hard way what happens when they don't pay their bills on time and incur late fees.

Beyond Saving & Credit-Real Decision Making

Our game focuses not just on credit and savings goals, but also building and maintaining a healthy "Quality of Life". Other budget games reward students for saving as much as possible. We emphasize that most spending decisions don't have a clear "right" or "wrong" answer, but build on each other to paint a complete picture of the student's financial well-being.



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The Stock Game

EXPOSING STUDENTS TO THE FINANCIAL MARKETS

Students learn how to reach their long-term financial goals through the Stock Game!

Easy & Fully Customizable Class Set-up

What's Included

- Stocks, options, bonds, mutual funds, forex and cryptos
- Real-time prices for US stock exchange
- 30+ major global currencies
- 40+ global exchanges
- Live class rankings
- Adjustable cash balance, weekly deposits, interest rates, margin trading, diversification and more
- Teams or individual student accounts
- Recommended group projects, lesson plans and grading rubrics on investing and economics topics.



BUY

PORTFOLIO
+ 8.14%



SELL

NET WORTH
+ 8.14%



OBJECTIVES

Students get valuable experience building a virtual portfolio that mimics how real-world investors save for retirement. Your students will get experience trading and investing in US securities with real-time prices. They will experience all the ups and downs of the business and economic cycles and how changes in the market affect their portfolios.

Students are provided introductory videos to learn the basics of how to research companies and stocks, how to trade stocks, bonds, and mutual funds, and how to build a diversified portfolio.

STUDENTS LEARN

Building a Portfolio of Stocks, Bonds and Mutual Funds

Students can trade on margin to see the risks of becoming over-leveraged, and use different order types like market orders, short selling or even day trading. Your students can practice their investing strategies before making mistakes with their real money.

The Importance of Portfolio Diversification

Teachers can set diversification rules for their class. This will require students to invest no more than a specific percentage (%) of their portfolio in one stock, or students are required to purchase a certain amount of other assets.



Conducting Thorough Investing Research

PersonalFinanceLab® has a full suite of professional-grade built-in research tools, so students can do their market analysis all in one place! We have smart symbol lookups, trading ideas, stock screeners with interactive charts, full financial statements, Wall Street analyst ratings, historical prices, accounting ratios, and much more for every company.

Weekly Deposits

You can start your class with a low starting cash, like \$100 or \$1000, and then every week your students get a weekly deposit that you also choose. This transforms the experience to mimic how real-world investors put money aside into their retirement accounts every month. Students will need to rebalance their portfolios instead of passively holding a few stocks they purchased on the first day of class.



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Teachers Tools

We're here to help you teach personal finance and financial literacy to your students, either in the classroom or virtually. You can customize everything to fit the grade level and focus of your class.



PLUS All classes are invited to participate for free in our National Challenges and get the chance to win prizes!

REPORTS AND RESOURCES



REGISTRATION FILE

Get registration info on the students in your class.



PROGRESS REPORTS

All assignments are self-graded and the results are tallied here.



ACTIVITY REPORT

Verify what your students are doing while logged in.



CUSTOM REPORTS

Design your own reports to review the results.



SUGGESTED CLASS ACTIVITIES

Teacher & Student packets that tie games to academic standards.



GUIDES & VIDEOS

How-to guides, and teaching materials to support your class.

LMS Integration

Once you have a site license with PersonalFinanceLab® you and your students can take advantage of single sign-on through platforms like Canvas, Schoology, Blackboard or D2L.

Seamlessly get access to the Stock Game, Budget Game and our curriculum library through whatever interface you're already familiar with!

GET A QUOTE

To find out about our pricing, get personalized quotes, schedule a demo, or order for your school, visit:

www.personalfinancelab.com

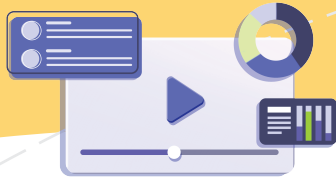
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**INCLUDED WITH
THE STOCK &
BUDGET GAMES**

LEARNING LIBRARY 300+ Lessons

All the topics you wish you would have learned in school.



STANDARDS ALIGNED

Following Jump\$tart Standards and several state standards for personal finance education. With self-grading assessments, and progress reports so you know how much your students are learning. Gaining key insights on their performance.

CERTIFICATIONS

Partnering with WISE Certification so your students can graduate with a credential to kick start the next chapter of their lives! We also offer a Financial Literacy Completion Certificate & an Investing101 Certificate to reward students for their hard work.

WHAT ELSE DO YOU GET?



**9 AND 18 WEEK
COURSE OUTLINES**

Bring together the experiential learning into group projects and class activities.



**LESSON PLANS &
SLIDESHOWS**

Includes topics like Needs vs. Wants, Opportunity Cost, or Comparison Shopping.



CAREER CENTER

Designed to help students build employability skills and keep them thinking about their future careers.

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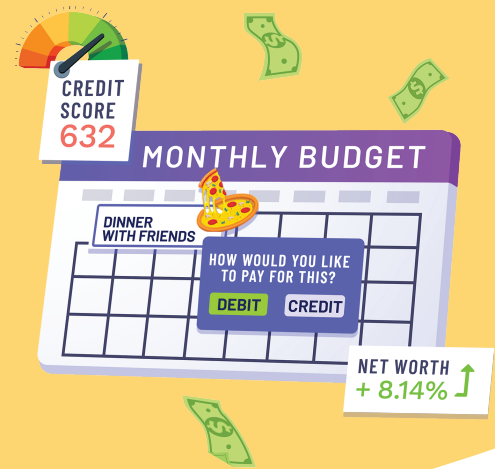
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Who are we?

PersonalFinanceLab® is a fun and interactive platform designed for K12 students to practice personal finance skills. It's the property of Stock-Trak, Inc., the world's leading provider of web-based educational financial simulations for 30 years.



SPONSORSHIP PACKAGES

- **Silver Package.** 100 user accounts - \$1,425
- **Gold Package.** 250 user accounts - \$3,375
- **Platinum Package.** 1,000 user accounts - \$12,000



Volume discounts are available when sponsoring multiple schools.

SPONSORSHIP INCLUDES:



• Customizable and interactive Budget & Stock Games



• Live teacher training webinar



• Full curriculum library with standards-aligned lessons



• Live chat customer support (9AM to 5PM EST)



• Dedicated account manager



• Partial branding on PersonalFinanceLab website.

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FINANCE. EDUCATION. GAMIFIED. 