

Unit 04: Investments

Content Area: **21st Century Life & Careers**
Course(s): **Personal Finance**
Time Period: **Semester 1**
Length: **4 weeks**
Status: **Published**

Unit Introduction

Standards

WORK.9-12.9.2.12.B.7	Develop personal financial planning strategies that respond to and use tax deductions and shelters.
WORK.9-12.9.2.12.B.9	Chart and evaluate the growth of mid- and long-term investments.
WORK.9-12.9.2.12.C.1	Compare and contrast the financial benefits of different products and services offered by a variety of financial institutions.
WORK.9-12.9.2.12.D.1	Summarize how investing builds wealth and assists in meeting long- and short-term financial goals.
WORK.9-12.9.2.12.D.3	Justify the use of savings and investment options to meet targeted goals.
WORK.9-12.9.2.12.D.4	Analyze processes and vehicles for buying and selling investments.
WORK.9-12.9.2.12.D.5	Compare the risk, return, and liquidity of various savings and investment alternatives.
WORK.9-12.9.2.12.D.8	Differentiate among various investment products and savings vehicles and how to use them most effectively.
WORK.9-12.9.2.12.D.10	Compare and contrast the past and present role of government in the financial industry and in the regulation of financial markets.
WORK.9-12.9.2.12.D.11	Determine the impact of various market events on stock market prices and on other savings and investments.
WORK.9-12.9.2.12.D.13	Analyze how savings, retirement plans, and other investment options help to shift current income for purposes of tax reporting and filing.
WORK.9-12.9.2.12.E.1	Analyze and apply multiple sources of financial information when prioritizing financial decisions.
WORK.9-12.9.2.12.F.3	Assess the impact of emerging global economic events on financial planning.

Essential Questions

1. What are the stages of investing?

2. What are the reasons a person should invest?

3. What are the characteristics of a stock?
4. What are some investment strategies for investing in the stock market?
5. What are some investment strategies for investing in other investment options?

Content / Skills

- Stages of investing
- Risk of investing
- Investment strategies
- Sources of financial information
- Features of common and preferred stock
- Stock investment classifications
- Factors that affect a stock's value and price
- Process of buying and selling securities
- Short and long-term investment strategies