

# Dollars and \$ense Program

February 27 – May 1, 2011

3:00 PM - 5:00 PM

## TENTATIVE Curriculum

### Week One: Orientation and Program Guidelines

### Week Two: Plan for Life

- The importance of planning
- Developing a Career Plan
- Making a Budget
- Managing your money

### Week Three: Investment Power (Part I)

- The power of investing
- The Corporation
- The Investment supermarket
- Buying and Selling stock
- Stock Market Literacy
- Stock selection guide overview
- Plot the data
- Trend lines and growth rates
- Distribution of mock money

### Week Four: Mutual Interests

- Mutual Funds
- Investigating mutual funds
- Choosing mutual funds
- Portfolio Development

### Week Five: The Big Picture

- Plug the Leaks
- Protect Yourself
- A car and a house
- Portfolio Development

### Week Six: Investor Blueprint

- Investment Principles
- Search for companies to study
- Portfolio Development
- The annual report
- Income statement and balance sheet
- Portfolio Development

### Week Seven: Projecting the Future

- Evaluate management
- Estimate future growth rates
- Portfolio Development
- Price- Earnings History
- Evaluate risk and reward
- Portfolio Development

### Week Eight: The Bottom Line

- The Five-Year potential
- Make your decision
- Portfolio Development



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