

CASHY LESSON PLAN



TOPIC

MONEY PERSONALITIES

NOTES

LEARNING OUTCOMES

Define and understand what a money strategy is.
Distinguish between their chosen and subconscious money habits.
Identify different money personalities and the pros and risks of each type.

MATERIALS NEEDED

Internet Access
Printed tracking spreadsheets during the game

VOCABULARY

| | |
|-----------------|-------------------|
| Financial goals | Money strategy |
| Spending | Money personality |
| Investing | Money habits |
| Saving | |

INTRO

What is one of your financial goals in life? What other financial goals can people have? How did you choose your goal?

How do you plan on reaching your goal (your strategy)? How did you choose this plan? What is something you wish you knew how to do so you could reach your goal faster?

Explain what strategy is and talk about how money habits can be subconsciously learnt by seeing how others (parents, friends, etc.) handle their money or they can be purposefully developed.

ACTIVITIES

Understanding your money personality can help you make better financial choices. It will help you understand your strengths and weaknesses.

[Read this article](#): Which one do you think you are? Which ones overlap or seem similar? Did you see different parts of the different personalities apply to you?

Take this [money personality quiz](#). What was your result? Were there any questions that surprised or confused you? Did you learn something new about yourself?

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ACTIVITIES

Before we play Cashy: write down your strategy - what are you going to focus on? Do you plan on saving everything you can? How do you plan on determining what you will invest in?

During Cashy: keep track of your expenses and savings with your worksheet

OUTRO

Did you see your money personality influence your decisions in Cashy? Give an example. Did you like the results?

What is your one takeaway from this lesson?

ASSESSMENT

What was part of your Cashy strategy that you would also do in real life? Why?

What was part of your Cashy strategy that you wouldn't do in real life? Why?

Did anything surprise you?

What happiness % did you end up with? How would you feel if that was your happiness level in real life? What do you think influenced your happiness the most?

Think back to your financial goal from the beginning of the class - what are three strategic steps you can take to reach that goal?