



Financial Literacy

Financial Future Assignment

Directions: Your goal is to develop a financial plan that shows what actions you can take to have a solid financial future, including saving and investing while you work to reach your long-term financial goals. Listed below are stages of your future life, life events and financial tools. For each life stage include the life events you may experience and explain the details of the financial tools you will use and why you chose to use them.

Note: You may decide not to use every financial tool but then explain why you would not. Once completed, submit the assignment to your teacher.

Life Stage

Young adult ages 15-25

Working adult with or without children ages 26-45

Pre-retirement ages 45-64

Retirement ages 65+

Life Events

Receiving higher education

Establishing an emergency fund

Getting married

Buying a home

Starting a family

Going on vacation

Starting a retirement fund

Retiring

Financial Tools:

Savings account

Money market

Certificate of deposit

Bond

Stock

Real estate

Mutual fund

Commodities

Retirement fund

Life Stage	Life Events	What financial tools will I need?
Young adult ages 15-25		



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