

Student's Name:

Teacher:

Subject: Year 9 Enterprise: Personal Finance Planning

Year 9

Date set: 20th February

Deadline for handing in: 2nd March

Project title: Personal Finance: Savings

Scenario: You are a Personal Finance Advisor (a person who gives advice to other people about finance). You have been asked by the local primary school to provide some advice on why children should save. They would also like you to say where you can put money in order to save and the advantages of this. You will need to do some research to find out the information you need to do the following tasks.

Tasks

Create a series of posters which show the following:

Poster 1 Why it is important to save.

Poster 2 Why it is not a good idea just to keep the money in your house (consider what would happen if you put it under your bed or mattress, or in a cupboard, or under the floorboards, or in a drawer). It could be lost, borrowed or even stolen!

Poster 3 What is a bank, a building society and a post office? What do they do? (You might want to make more than one poster for this)

Poster 4 A bank or building society or post office offer 'accounts' and pay you 'interest'. Investigate these and show on the poster what these are and why it might be a good idea to put your savings in one of these.

I want to see:

	Checklist
Use of technical words	Yes
Logical structure	Yes
Clear presentation	Yes
Some subject content	Yes
Effective Literacy	Yes
Evidence of research	Yes

Useful Resources:

- Collect leaflets from banks, building societies and the Post Office;
- Ask an older person which bank/building society or post office they have their account and why;
- On the P.Drive there are 3 fact sheets: : PDrive/Business and Economics/KS3/Homework.factsheet.financial services; PDrive/Business and Economics/KS3/Homework.factsheet.financial organisations and PDrive/Business and Economics/KS3/Homework.factsheet.spending money;
- www.bsa.org.uk – click on ‘About the BSA’; find a building society in your area and visit its website by clicking on the link.
- Google your local bank and see what they have to say about savings;

Extra things you could do:

- Make a suggestion about where you would put your savings and why.

THIS SHEET AND YOUR EVALUATION SHEET MUST BE ATTACHED TO YOUR PROJECT WHEN YOU HAND IT IN

Success Criteria:

Independent Enquirer

Level	Level Description
5	Evidence of research is satisfactory. Facts are partly accurate and there is some use of the relevant theory and business terminology. No analysis of alternatives is provided, but an attempt has been made to provide a recommendation.
4	Some research has been carried out, resulting in two or three accurate facts being presented. Basic understanding of the subject is demonstrated alongside some use of business terminology.
3	There is evidence of a little research and one or two facts presented are accurate. There is very basic understanding of the subject involved and a little business terminology has been used.

Success Criteria:

Creative Thinker

Level	Level Description
5	Has offered a limited number of possibilities. Acceptable presentation of work and materials.
4	Has offered more than one way of doing things. Presentation of work and materials could be improved
3	Has offered own ideas. Presentation of work and materials needs support for development.

EVALUATION SHEET

I would rate my research as:

Very good

Good

Quite good

Could have been better

I could have made my work more interesting by

I learnt

I enjoyed

Success Criteria:

Reflective Thinker

Level	Level Description
5	There is an appropriate evaluation which shows areas to be considered for improvement.
4	Evidence of progress has been demonstrated and ideas given for future actions.
3	There is a brief description of how well the project went and at least one example offered for positive changes that could be made.