



# Moneytalk Financial Foundations

Below is a listing of the available financial life-skill. Mark the financial topics and associated skills that you are most interested in learning more about.

Name (optional): \_\_\_\_\_

Setting goals		Investments
How to turn dreams into goals		Terms: stocks, bonds, dividends, diversify
Answer your specific questions		Retirement accounts
Managing a bank account		Non-retirement accounts
Tracking the activity (register)		College savings accounts
Putting money in (deposits)		Mutual fund, Money market, Stock fund
Taking money out (withdrawal)		Activity: tools to research mutual funds
Checks, Debit card, Credit card, ATM		Answer your specific questions
Balance with bank transactions (reconcile)		Protecting your identity
Strategies for success		Simple steps to minimize your risk
Activity—Life simulation		How can you tell if your identity been stolen
Answer your specific questions		What to do if you think you are a victim
Budgeting your money		Answer your specific questions
Creating a budget		Taxes
Cash flow		Payroll tax
Strategies for success		Sales tax
Activity—create and use a budget		Property tax
Answer your specific questions		Income tax, terms, tax brackets
Parent tips for teaching teens or young adults		Tax forms: W-4, 1099, 1040
Credit Reports		Answer your specific questions
Activity—Pull your credit reports online		Let us know personal & consumer topics of interest
Understand credit report & score		1.
How to increase or repair your report		2.
How are your credit score & report used		3.
Answer your specific questions		4.
Eliminate Your Debt		5.
Understand debt: types, consolidation, etc		6.
Approaches to getting out of debt		7.
Strategies to stay out of debt		8.
Answer your specific questions		9.
Insurance		10.
Understanding types & terms		11.
Activity: types & terms		12.
Answer your specific questions		13.
		14.