



MONEY SMART

Grades 3 - 5

GOT QUESTIONS? CONTACT OUR SOLUTION CENTER

Call Toll-Free at (833) 732-8351

Hours of Operation: Monday – Friday

8:30 am until 5:00 pm

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Lesson 2: Get Set for Goals

WHAT ARE YOUR GOALS?



Name: _____

A **short-term goal** is something you want to achieve soon, such as in two weeks or a few months. A **long-term goal** is something you want to achieve in the future— in one year, five years, or when you're an adult.

Directions: Write some of your short-term and long-term goals in the chart below. Then answer the questions that follow.

Short-Term Goal	Long-Term Goal

1. What is your most important short-term goal?

A. When do you want to reach that goal?

B. How might you reach that goal?

2. What is your most important long-term goal?

A. When do you want to reach that goal?

B. How might you reach that goal?

Lesson 6: Get Invested

COMPLETE THE STORY



Name: _____

Directions: Read the passage and fill in each blank with the correct word from the word box.

WORD BOX				
lose	bond	stocks	CD	goals
profit	company	interest	wisely	invest

My friend Ty is always talking about his long-term money _____.

He plans to manage his money _____. When he is older, he

wants to _____ money in several places. First, he says he'll buy

a _____ from the bank so he can earn _____.

He may also buy a _____ from the government. Later, he

is going to buy _____ so he can own shares of a company.

If the company makes a big _____, he could make a lot

of money! But if the _____ company does not, he could

_____ his money. Ty told me that's a risk he'll have to take.

One day he might even start his own _____.