



# MoneySense

## *Creating a Financially Responsible Society One Student at a Time*

### Educating Middle and High School Students about Personal Finances

September 2011

#### Needs

- **Skills**—Young Adults need the skills to manage their personal finances through saving, spending wisely, and creating & tracking budgets.
- **Resources**—Young Adults need help, whether from technology or from professionals, to organize their finances.

#### Solution

- Educate**— teach students these skills directly in their classrooms.
- **Activities**—Use real-life examples and give students an opportunity to use the skills taught through this program.
  - **Discussions**—directly involve students in their learning to ensure that every student draws from the lessons.
  - **Technology**—Use online games and software to make the program more intuitive for a tech-savvy generation.

#### Goals

Create a future generation that is more financially responsible.

- 1. By Year 3:** Have 2 corporate sponsors (financial institutions) and spread outside of Puget Sound region.
- 2. By Year 2:** Implement program in 5 middle and high schools in Puget Sound area. Begin revenue-generation from schools.
- 3. Year 1:** Complete curriculum design and begin implementing program in first school.

#### Implementation Plan

- **Design Curriculum**—
  - **Consult**—Consult with economic professionals and teachers to design optimal material and emphasize important points.
  - **Develop**—Hire off-shore web-developers to create online resources.
- **Find Customers**—Consult with schools to find interest and a place to begin implementation process.
- **Recruit Volunteers**—
  - **Community**—Pitch to financial institutions and other businesses to allow their employees to take time off to volunteer as teachers for MoneySense.
  - **College**—Find college students who would be interested in volunteering to gain teaching experience.
- **Find Sponsors**—Pitch to financial institutions to sponsor MoneySense in exchange for advertisement to students (future customers).

#### Team & Partners

**Team:** Akshay Chalana (High School Freshman, Eastside Preparatory School, Founder of MoneySense), Vandana Chalana (Full-Time Volunteer at Cedar Wood Elementary School, Junior Achievement, Woodside Elementary School, Initial Volunteer, Curriculum Design Help), Vikram Chalana (Entrepreneur/CTO Winshuttle, Business Design Help)

**Advisors:** Dr. Terry Macaluso (Head of School, Eastside Preparatory School, Initial Implementation Help)

#### Other Potential Partners:

- Junior Achievement
  - Similar Goal with focus on entrepreneurship and business; International; Low-Tech
- Jump\$tart
  - Resources for similar organizations

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