

Life Event Planning

—

An exercise in financial literacy

Life Event Planning

An exercise in financial literacy

Or: **HOW TO GET THE MOST FOR YOUR \$\$\$\$**

Choose a **REAL LIFE** event that
you will likely have to deal with in
the next year.

—



—





OR . . .

—



—



—





Now make a plan!



What do you need?

Where can you find that?

How much will it cost?

Where will you get the money to pay for all of this????

Let's look at what your completed assignment should look like . . .

—

Here is an abbreviated example.

Life Event Planning

Sample: Project Identification Page

Keep your title page simple. No graphics. A colored or thematic font is okay for your title.

Mrs. Hopp
Santa Clara High School
Santa Clara, CA.

Ukelele in Kalapaki

Life Event Planning

Sample: Table of contents

Here is where you list the parts of the portfolio in order. Your plan will be longer than the sample, so you will have more than one page for some sections.



Table of Contents

1. *Planning Process Summary Page Form*
2. *Profile of Event*
3. *Comparison Shopping*
4. *Event Plan*
5. *Resources Summary*

Life Event Planning

Sample: FCCLA Planning Process



FCCLA Planning Process Summary Page Template



(This template may be modified, but all headings must be used in the correct order. The FCCLA logo, STAR Events logo, and Planning Process graphics are encouraged but not required.)

IDENTIFY CONCERNS



time
\$
resources

SET A GOAL



learn how to play the ukelele

FORM A PLAN (WHO, WHAT, WHEN, WHERE, HOW, COST, RESOURCES, AND EVALUATION)



who: me
what: learn how to play the Ukelele
when: before Summer
where: within 30 miles of home
how: lessons
cost: *200 or less
resources: o internet, music stores, friends

ACT



find a ukelele to buy or borrow
find a place to take lessons

FOLLOW UP



Use my research & financial plan
to put my event into action.

Once you have decided on a project, use this form to make a plan.

Life Event Planning

Sample: Divider Pages

Include up to FOUR divider pages. Creative fonts, clip art, borders or decorative elements may be included.

Comparison Shopping



Life Event Planning

Sample: Profile of Event

Can be up to three pages long

Event: Ukulele playing on Kalapaki Beach

Date of Event: June 10-20

Description of the role of needs and wants: On my upcoming trip to Kalapaki Beach, I want to be able to spend restful hours playing the ukulele. I want to have an instrument that is of high enough quality to make my efforts successful. I need to have some sort of instruction that is flexible and can work around my work schedule, so that I don't get too busy and give up.

Goal statement: My goal is to play the ukulele in Hawaii this Summer.

Description of the role of values and/ or priorities: My priorities are to move quickly on this project in order to allow my self sufficient practice time before Summer. I value the quality of the lessons, because I don't want to waste my time or money on lessons that aren't productive.

Summary of challenges: I see my biggest challenge as finding lessons that will motivate me to practice a lot and not give up.

Event: Ukulele playing on Kalapaki Beach

Date of Event: June 10-20

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Another example: You are planning for Prom. You would “like”

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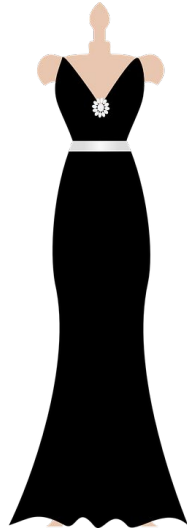
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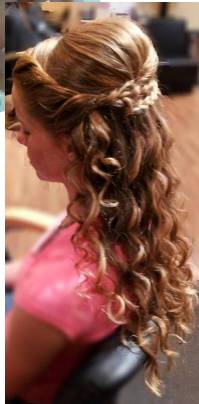
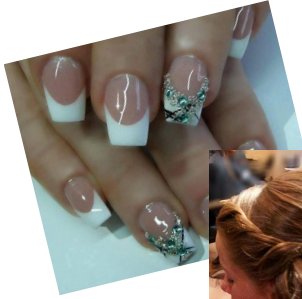
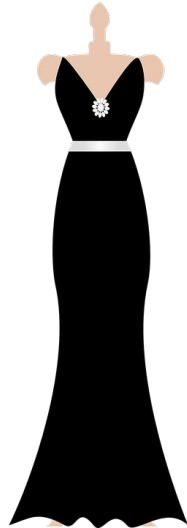
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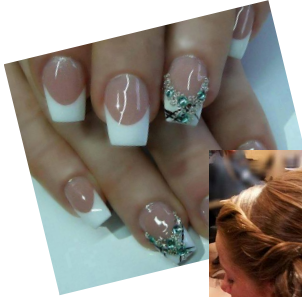
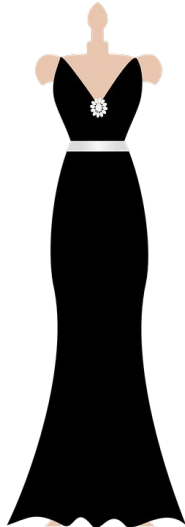
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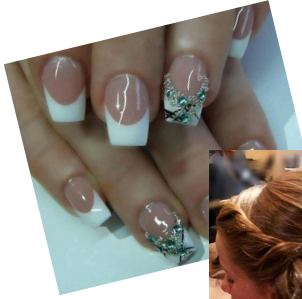
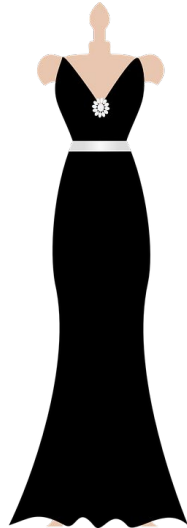
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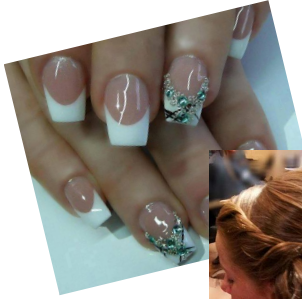
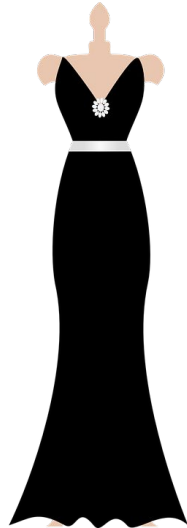
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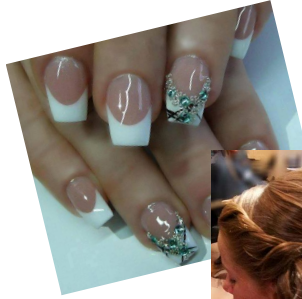
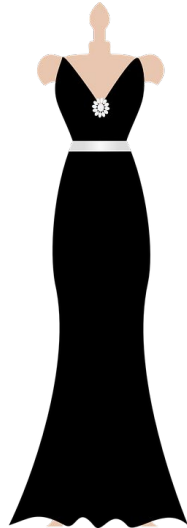
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Life Event Planning
Sample: Profile of Event

But your budget isn't big enough . . . so you need to set priorities. What do you value most?



Life Event Planning




Sample: Comparison Shopping

Item #1: Ukulele

Function: this is the instrument required to learn to play

Priority: #1 priority - HIGH priority - I cannot learn to play the ukulele if I do not have one to play.






Source	Tru Joy Acoustics Online Co.	Guitar Showcase	My Mom
Description	Oscar Schmidt OUIT Spalted Mango Long Neck Tenor Ukulele Bundle with Gearlux Case, Austin Bazaar Instructional DVD, Clip-On Tuner, and Polishing Cloth	Diamond Head DU-106 Rainbow Soprano Ukulele - Light Blue	The 50 year old ukulele at my Mom's house. It isn't very nice looking anymore and I would need to buy new strings for it.
price	\$210.00	\$39	free
features	Highest rated on Amazon.com. 5 star rating, comes with instruction DVD & case	Available locally, I can buy it today. I can try it out and HEAR what it sounds like. It's pretty and thematic	I used to play it when I was a kid, so it has that nostalgia thing going for it.
item			

Can be up to twelve pages long.
This sample shows only 1 item,
you need at least FIVE.

Life Event Planning

Sample:
Comparison
Shopping

Source	Tru Joy Accoustics Online Co.	Guitar Showcase	My Mom
Description	Oscar Schmidt OU7T Spalted Mango Long Neck Tenor Ukulele Bundle with Gearlux Case, Austin Bazaar Instructional DVD, Clip-On Tuner, and Polishing Cloth	Diamond Head DU-106 Rainbow Soprano Ukulele - Light Blue	The 50 year old ukulele at my Mom's house. It isn't very nice looking anymore and I would need to buy new strings for it.
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item			

Life Event Planning

Sample: Comparison Shopping

Think outside the box . . .

You can look at Garage
Sale prices, EBay, loans
from family and friends,
Craigs list, etc, etc, etc.

What if you are planning a Graduation celebration in Santa Cruz? How are you going to get there?

**Do some comparison
shopping!**

Life Event Planning

Sample: Comparison Shopping



Life Event Planning

Sample: Comparison Shopping



Life Event Planning

Sample: Comparison Shopping



Life Event Planning

Sample: Comparison Shopping



Hundreds
of dollars



Tens of
dollars



Zero
dollars

Life Event Planning

Sample: Resources Summary

May be up to two pages long. Add at LEAST 6 resources. You may NOT use only the internet.

My biggest resource was the Internet. I was able to do 90% of my research online. I did call a local music store and spoke to a music teacher about what lessons at their school would be like, when they are offered and how much they would cost. I also went to my Mother's house to look at her ukulele and stopped by Guitar Showcase to see what the ukuleles looked like in person and more importantly what they sound like. All other research and shopping was done online. I learned that shopping for something like a musical instrument is probably best done in person so that you can feel and hear the instrument.

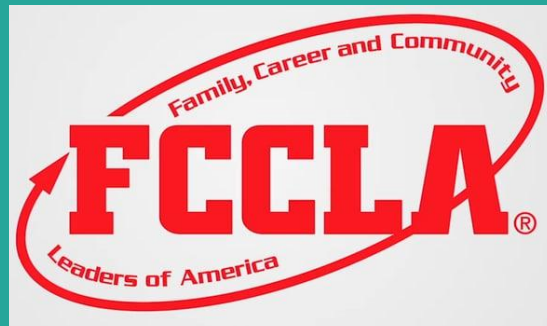
Life Event Planning

Sample: Resources Summary

Resources		
1	Guitar Showcase Salesman	Opportunity to try out instruments and speak to someone knowledgeable about ukuleles
2	The internet	In searching, I discovered that many online ukulele courses exist, many are completely free
3	Sarah Duarte	The music teacher at Willow Glen High School has played ukulele for 5 years and offered insight into whether it was worth starting with an expensive instrument or not.
4		
5		
6		

Now go make
a plan and
get the most
for your
money!





Life Event Planning is a National FCCLA STAR event. If you add an oral presentation to this, you can compete with students from other schools.

And be recognized
for your efforts!

