

## Lesson 1

### DIY investing planning sheet

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**Instructions:** Assume the role of the client card you have been given. Read the card to understand what your scenario is and keep it in mind for the entire role play. Your goal is to think about the best investment strategy for yourself (the client) given the information on the card. You will then meet with other students who have the same client card and share your strategies.

**Step 1:** Read your client card. Determine the best strategy for your client through online research or prior knowledge. Remember to consider the client's needs and wants (age, goal, risk, experience) from the client card!

**Step 2:** Create three questions you would want to ask a financial advisor to make better choices. What doubts do you have about your strategy? What advice would you want to get? What facts would you want to know?

**Step 3:** Meet with other students who share the same client card as you. Discuss your strategies together to determine what was similar and different. Come to a final conclusion on the best strategy for yourselves (as the client doing DIY investing).

**Step 4:** Reflect on the activity in full sentences. Prepare to submit your reflection and share your answers with the class.

**1. What similarities or differences did you notice when comparing strategies with other students with the same client card as you?**

**2. Would DIY investing be helpful for your given client? Why or why not?**

**3. What types of questions do you think a DIY investor might struggle to answer without help from a financial advisor?**

**4. What method would you prefer for managing your own investments, DIY or working with an advisor, and why?**