

Lesson 1

Team name: _____

Team members: _____

DIY vs. financial advisor debate: Preparation sheet

Your goal: Convince the judges that your method (DIY investing or using a financial advisor) is the better choice for investors.

Reminders: These criteria are part of your scoring!

- Be clear and organized. Use the handouts as a guide.
- Stay respectful – strong points, not personal attacks. Give each team its time and listen carefully!
- Work together and have fun! Every member should have a part in the debate.

1. Opening statement plan (two minutes): In a few sentences, define what your method involves. Highlight three main advantages you will discuss in the debate.

2. Key argument areas: Fill in at least three key points for your side of the argument (either Team DIY investing or Team financial advisor). Ideas to consider: control over investments, costs of this method, time commitment for method, trust and experience for method, stress level for method, outcomes and results of method.

Possible strengths of your team	
Argument 1	
Argument 2	
Argument 3	

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3. Rebuttal plan: Think about three possible weaknesses of the other team to prepare for your rebuttal. Ideas to consider: control over investments, costs of this method, time commitment for method, trust and experience for method, stress level for method, outcomes and results of method.

Possible weaknesses/rebuttals against other team	
Argument 1	
Argument 2	
Argument 3	

4. Closing statement plan: How will you wrap up your argument powerfully? Restate why your method is best in one strong sentence.