

Lesson 4

Team name: _____

Team members: _____

Debate planning sheet

Step 1: Opening statement : Create your opening statement using the table below and your resources as a guide.

GUIDING PROMPT	YOUR TEAM'S RESPONSE/NOTES
What is your investment style called?	
Briefly, how does your style work?	
What is the main goal of your style?	
Why is your style the best choice for investors?	
What key points will you cover in your argument?	

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Step 2: Creating your arguments: Using your investment styles comparison chart, the Fidelity video and the guiding questions below, come up with three strong arguments to promote your style of investment. Consider the following questions:

- How does this style aim to meet investor goals?
- What are the cost implications?
- What level of risk and management effort is involved?
- For which types of investors is this style most suitable?

Three arguments	Supporting example from video

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Step 3: Preparing a rebuttal: Using your resources, prepare a three-point rebuttal to “attack” the other style. Ask yourselves:

- What flaws or risks might be hidden in their style?
- Is their approach too expensive, risky or passive?
- Does your style offer a smarter, more flexible or more cost-effective solution?
- Are their claims realistic for average investors?

Disadvantages of other style	What’s the strength of your style that makes it preferable to the other two options?

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Step 4: Team roles: Ensuring all students participate equally in the debate, split up who will say what!

TEAM MEMBER	SPEAKING ROLE
Opening statement	
Argument #1	
Argument #2	
Argument #3	
Rebuttal #1	
Rebuttal #2	
Rebuttal #3	