



Task Title: Starting a Bank Account

OALCF Cover Sheet – Learner Copy

Learner Name: _____

Date Started (m/d/yyyy): _____

Date Completed (m/d/yyyy): _____

Task Description: Learners will complete a form based on finances and their future plans.

Competency: B: Communicate Ideas and Information
E: Manage Learning

Task Groups: B1: Interact with Others
B3: Complete and create documents
E.2: N/A

Level Indicators:

- B1.2: Initiate and maintain interactions with one or more persons to discuss, explain or exchange information and opinions
- B3.3a: Decide what, where, and how to enter information in somewhat complex documents
- E.2: Set realistic short- and long-term goals, use a limited number of learning strategies and monitor own learning

Task Title: Starting_a_Bank_Account_I_B1.2_B3.3a_E2

Materials Required:

- Decide whether interactions will be in a small group or one on one with the instructor
- Pencil or pen

Learner Information and Tasks

When opening an account at Libro you will be asked to fill in a Prosperity Planner. Look at the "My Prosperity Planner."

Task 1: Fill out the Prosperity Planner

Task 2: Discuss the Prosperity Planner with your Instructor

My Prosperity Planner

Name: _____

Date: _____

Prosperity means different things to different people. The journey to achieve it can be simple and fun. Set priorities, plan small steps, take each step and remember to enjoy lots of sunshine along the way. One other thing – it helps to have a Coach and a few tools to make the journey that much more rewarding. Welcome to the Prosperity Planner. We're glad you're here.

In one word, what does prosperity mean to you? _____

Starting Points

Let's begin your prosperity conversation with what's most important to you. Think about your future and describe what it looks like in these areas.



Must Do & Love To

While prosperity isn't all about money, money influences financial priorities and inspires possibilities, especially when matched with a plan. What does prosperity mean to you?

Choose three from the Must Do column and three from Love To, to start your Libro coaching conversation.

	Must Do	Love To
Set \$ aside monthly	<input type="checkbox"/>	<input type="checkbox"/>
Reduce debt stress	<input type="checkbox"/>	<input type="checkbox"/>
Home of my own	<input type="checkbox"/>	<input type="checkbox"/>
A better home of my own	<input type="checkbox"/>	<input type="checkbox"/>
Reliable transportation	<input type="checkbox"/>	<input type="checkbox"/>
Flexibility in my budget	<input type="checkbox"/>	<input type="checkbox"/>
Do my own business thing	<input type="checkbox"/>	<input type="checkbox"/>
Travel the world	<input type="checkbox"/>	<input type="checkbox"/>
Invest like a guru	<input type="checkbox"/>	<input type="checkbox"/>
Invest in my community	<input type="checkbox"/>	<input type="checkbox"/>
Babies	<input type="checkbox"/>	<input type="checkbox"/>
Educate my kids	<input type="checkbox"/>	<input type="checkbox"/>
Educate myself	<input type="checkbox"/>	<input type="checkbox"/>
Gourmet kitchens & en-suites	<input type="checkbox"/>	<input type="checkbox"/>
Freedom fifty-something	<input type="checkbox"/>	<input type="checkbox"/>
Freedom sixty-something	<input type="checkbox"/>	<input type="checkbox"/>
Personal wellness	<input type="checkbox"/>	<input type="checkbox"/>
Just have dinner out whenever	<input type="checkbox"/>	<input type="checkbox"/>
Other stuff _____	<input type="checkbox"/>	<input type="checkbox"/>

