



Task Title: Starting a Bank Account

OALCF Cover Sheet – Practitioner Copy

Learner Name: _____

Date Started (m/d/yyyy): _____

Date Completed (m/d/yyyy): _____

Successful Completion: Yes No

Goal Path: Employment Apprenticeship

Secondary School Post Secondary Independence

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

Performance Descriptors: See chart on the last page

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Materials Required:

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

Notes for instructors/facilitators:

Review individually

- Discussions with the learner will be important for the circles section...maybe it could be done in a pair with another learner
- Learner can start with the checklist independently, unless literacy levels are lower

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"/>



Performance Descriptors

Levels	Performance Descriptors	Needs Work	Completes task with support from practitioner	Completes task independently
B1.2	shows an awareness of factors that affect interactions, such as differences in opinions and ideas, and social, linguistic, and cultural differences			
	demonstrates some ability to use tone appropriately			
	uses strategies to maintain communication, such as encouraging responses from others and asking questions			
	speaks or signs clearly in a focused and organized way			
	rephrases to confirm or increase understanding			
	uses and interprets non-verbal cues (e.g. body language, facial expressions, gestures)			
B3.3a	uses layout to determine where to make entries			
	makes inferences to decide what, where, and how to enter information			
E.2	sets realistic short-and long-term goals			
	identifies steps required to achieve goals			
	identifies barriers to achieving goals			

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Levels	Performance Descriptors	Needs Work	Completes task with support from practitioner	Completes task independently
E.2	begins to adjust goals, activities, and timelines to address obstacles to achieving goals			
	sequences activities in multi-step tasks			
	begins to identify how skills and strategies can transfer to different contexts			
	identifies multiple sources of information to complete tasks			

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This task:

Was successfully completed

Needs to be tried again

Learner Comments:

Instructor (print):

Learner Signature
