



Budget and Stock Game - Final Report and Presentation

You've done it – right to the end of class. All team members should now have completed the full budget game and received their final scores. Your team's stock portfolio is also now finished, and you can review your final standing.

The final project for this course is to work together as a team to prepare a final report of your activities on PersonalFinanceLab. This will include both how each individual team member did in the budget game (and what went differently for each of you), and a review of the performance of your portfolio in the stock game.

Your team is not evaluated based on the total gain or loss of your portfolio, but on how well you understand the impact of your investing objectives and what you have learned from the experience.

Final Report

Your final report should include the following information:

1. A Final Budget Game Report
 - a. A summary of each team member's final positions in the budget game, including:
 - i. Final Overall Score
 - ii. Final Credit Score
 - iii. Final Quality of Life Score
 - iv. Final Savings Account Balance and Checking Account Balance
 - v. The number of months each student was able to reach their savings goal
 - b. A discussion on the differences between the events in the budget game between each team member.
 - i. Why did each team member finish with different scores?
 - ii. Did some team members encounter significant events in the game that made progress harder or easier than their teammates?
 - c. If you were playing through the game again, what would you do differently?

- d. As a group, what do you think were the most realistic and least realistic parts of the budget game compared to what you expect to encounter in the real world?
2. A Final Stock Game Report
 - a. Restate your original objective statement from the very beginning of the stock game.
 - i. If you revised their objective statement as part of the “Check-In Project”, also state your updated objective statement, and explain why you made the change.
 - b. Restate your original team roles.
 - i. If you revised their team roles as part of the “Check-In Project”, also state the updated team roles, and why you made the change.
 - c. Include a discussion of how you set their objectives, and how well you stuck to their objectives over the duration of the class.
 - d. Identify the final portfolio holdings of the team using a pie chart.
 - e. Identify the investments the team made with the biggest gains and worst losses. Include the total profit or loss for each.
 - f. Identify two major real-world events that had a significant impact on your portfolio
 - g. If you were starting over from scratch and building a portfolio for 7 years instead of 7 weeks, what would you as a team have done differently?

Final Presentation

After compiling your final report, your team will also need to prepare a 5-minute presentation to the class about your key take-aways from the budget game and stock game.

Your presentation should focus on your key takeaways from the budget game and stock game. Explain what you found more challenging or easier than what you expected, how things were different in the budget game for each team member, and outline some of the disagreements your team had when building your investment portfolio (and how those disagreements were resolved).

After your team presents, other students will have the opportunity to ask questions as well. Part of your evaluation will be based on how well you can answer these additional questions.



Participation Score

Each team member will also need to separately submit a group evaluation form, outlining how much you believe each of your peers contributed to the overall stock game project, final report, and final presentation.

Each student is also expected to ask thoughtful questions after the other student's presentations, with a participation score based on the questions asked and any follow-ups.

Peer Evaluation Form

Team Member Name	On A Scale From 1-10, How Much Did This Team Member Contribute To Your Investment Project and Final Report?