



**International Center
for Leadership
in Education**



Gold Seal:

Copernicus Education Gateway

Author(s): Harlan Brody			Lesson Title: Stocks for Retirement			
Grade Span			ICLE Application Model			
K-4	5-8	9-12 XX	A	B	C	D XX

Instructional Focus:

Reading

Students read a variety of grade level materials, applying strategies appropriate to various situations.

Writing

Students write for a variety of purposes and audiences with sophistication and complexity appropriate to the grade level.

Performance Task

Mr. Frisbee stock recommendation- Good old Mr. Frisbee is in need of financial advice and guidance. He is 65 years old and has \$30,000 that he wants to invest in the stock market. He has been saving this money under his mattress for 30 years, now realizing inflation and bed bugs have been eating away at his money! Mr. Frisbee is retired and wants to live a comfortable retirement without having to live only off social security. Thus, Mr. Frisbee will need to have his money work for him in the stock market in order for him to continue his current lifestyle. Mr. Frisbee does not know much about investing in the stock market. He needs your HELP!

On a separate sheet of paper please describe in complete sentences Mr. Frisbee's different stock options. Be sure to be explicit about each of the following categories and give an example for each: blue chip, growth, income, speculative, cyclical and defensive stocks. Write your investment recommendations in complete sentences to Mr. Frisbee based on the different stock options and his situation. Keep in mind his age!

Resources: Textbook and Internet

GOOD LUCK!

Note to teachers: Before doing this activity, you may want to go over and model different categories of stocks and examples of each.

ICLE Essential Skills

Gather information from a variety of sources, including electronic sources, and summarize, analyze, and evaluate its use for a report (ela 23)

Scoring Guide:

Score each of the following characteristics on a scale of 4 to 0, where 4 = surpasses expectations; 3 = high quality performance; 2 = satisfactory quality performance; 1 = minimum quality performance; 0 = does not meet expectations.

CHARACTERISTICS	CRITERIA	SCORE
Research 6 categories of stock from textbook and Internet	<ul style="list-style-type: none">• Determine the categories stock• Assess the volatility of the stock• Classify an example of a stock that would fit each category	_____
Determine stock recommendation	<ul style="list-style-type: none">• Survey 6 stock categories and recommend a stock which is best for the scenario given	_____
Task Management	<ul style="list-style-type: none">• Manages time wisely• Uses available resources effectively• Cooperates with others as needed	_____

Keywords

English Language Arts		
Reading Research		
Writing Compare/contrast Internet Capitalization Paragraphs Proposals Spelling		
Communications Audience		
Other		