

INTUIT



turbotax



credit karma



quickbooks



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Intuit for Education & Council for Economic Education

Financial Education Curriculum &
How to teach taxes and prepare students for post-high school!

4/17/24

Meet your presenter!



Teymour Ashkan

Ok, but are
you
actually
ready?



**Would you rather have dinner
with Jay-Z or pocket \$50,000?**

I sit down with Jay-Z

Even Jay-Z would take the money

Who would make a better pet?

Baby Yoda

Minecraft Sheep

None of the Above

**One of these platforms has to go,
which one would you pick?**

TikTok

Netflix

Disney+

YouTube

Instagram

Would you rather

Never listen to music again

Only Listen to one Artist for the rest of
your life

**How often are you talking about
finances with your family?
(saving, earning, spending,
investing, or borrowing money)?**

1 Never

2

3

4

5 Very Often

**If you got \$1,000 for free today,
what would you do with it?**

Spend

Save

Invest

Gift it to Someone Else

Goals of this Intuit for Education session

- **Learn** how to use Intuit for Education, how to teach tax Basics for Students, the connection between Taxes, Loans and Financial Aid, and highlighting tax benefits for education
- **Try It!** our interactive online game, Prosperity Quest, which is designed to get students excited about finances

The session will cover the practical application of Intuit's free personal finance curriculum to help students grasp the relevance of taxes and loans in their financial aid applications and future financial planning. By the end of this session, counselors and educators will be equipped with the knowledge and tools to help students navigate the often-overlooked aspects of financial education related to post-secondary and higher education.

Sign up to join
Intuit for Education!



Why Intuit for Education?

- **Real-world tools**
- **Flexible**
- **Customizable**
- **Interactive**
- **Professional Development Resources**
- **And all free!**

The screenshot displays the Intuit for Education dashboard for a user named Ms. Roberts on Wednesday, October 4, 2023. The dashboard includes a left-hand navigation menu with options like Dashboard, Classes, Courses, and Resources. The main content area features a 'Good morning Ms. Roberts' greeting, a 'All Students' progress chart showing 2 students (1 completed, 1 past due), a video welcome message, and a 'My classes' table with columns for Students, Chapters assigned, and Completion.

My classes	Students	Chapters assigned	Completion	
2nd period - Finance	0	0	0%	View class ...
1st Period - Personal Finance	1	1	100%	View class ...

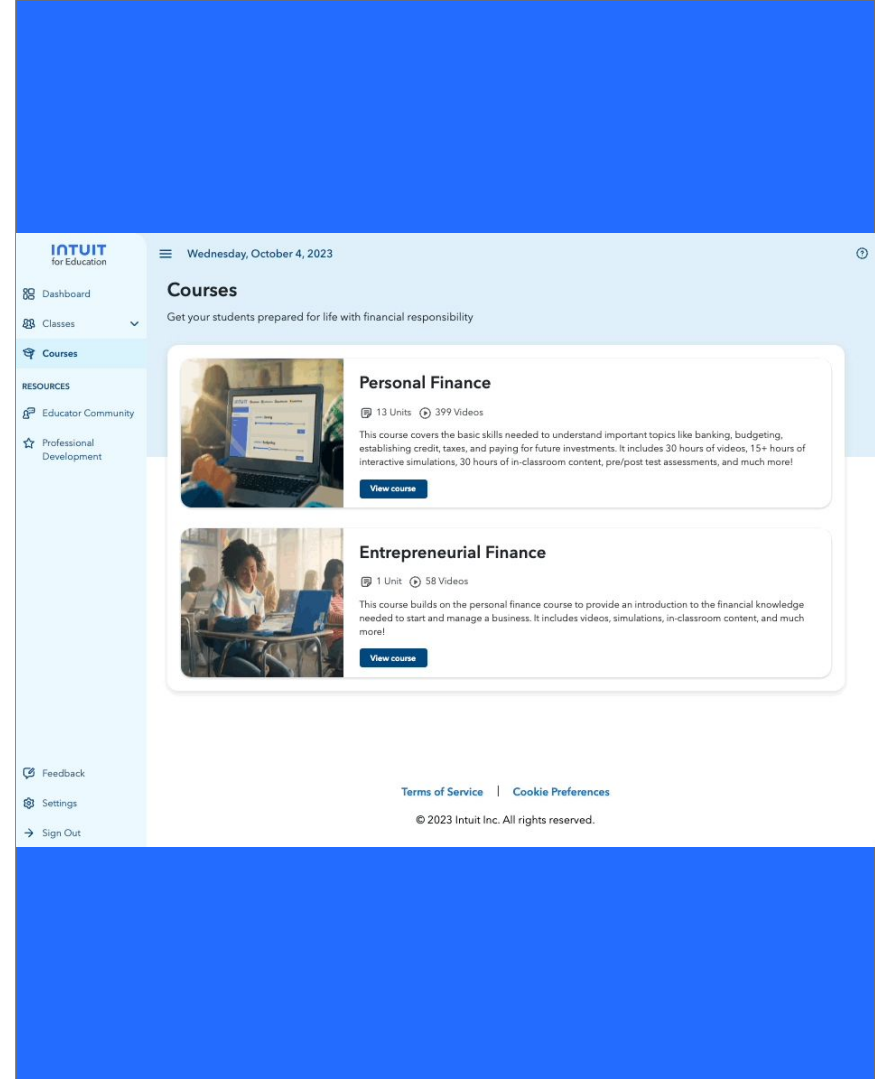
Explore comprehensive curriculum

Personal Finance Course

Provide students with the information they need to become financially literate as they move into adulthood.

Entrepreneurial Finance Course

Help students develop the foundational financial knowledge they need to succeed in managing the finances of a small business.



The screenshot displays the Intuit for Education dashboard. At the top, the date is Wednesday, October 4, 2023. The main heading is "Courses" with the subtext "Get your students prepared for life with financial responsibility". A sidebar on the left lists navigation options: Dashboard, Classes, Courses (selected), and Resources (Educator Community, Professional Development). The main content area features two course cards. The first card is for "Personal Finance", which includes 13 units and 399 videos. Its description states: "This course covers the basic skills needed to understand important topics like banking, budgeting, establishing credit, taxes, and paying for future investments. It includes 30 hours of videos, 15+ hours of interactive simulations, 30 hours of in-classroom content, pre/post test assessments, and much more!" A "View course" button is located below the description. The second card is for "Entrepreneurial Finance", which includes 1 unit and 58 videos. Its description states: "This course builds on the personal finance course to provide an introduction to the financial knowledge needed to start and manage a small business. It includes videos, simulations, in-classroom content, and much more!" A "View course" button is also present. At the bottom right of the dashboard, there are links for "Terms of Service" and "Cookie Preferences", and a copyright notice: "© 2023 Intuit Inc. All rights reserved."

Create an Account

1. Enter **your email**, choose a password, then click **Create account**.
2. Click **Get Started**.
3. Enter **name information and click Next**.
4. Enter your **school zip code** and **name, then click Next**.
5. Click **Submit** OR **Remind me later**.

INTUIT for Education

Create an Intuit Account

One account connected to everything Intuit.

Already have an account? [Sign In](#)

Email

Password


Confirm password

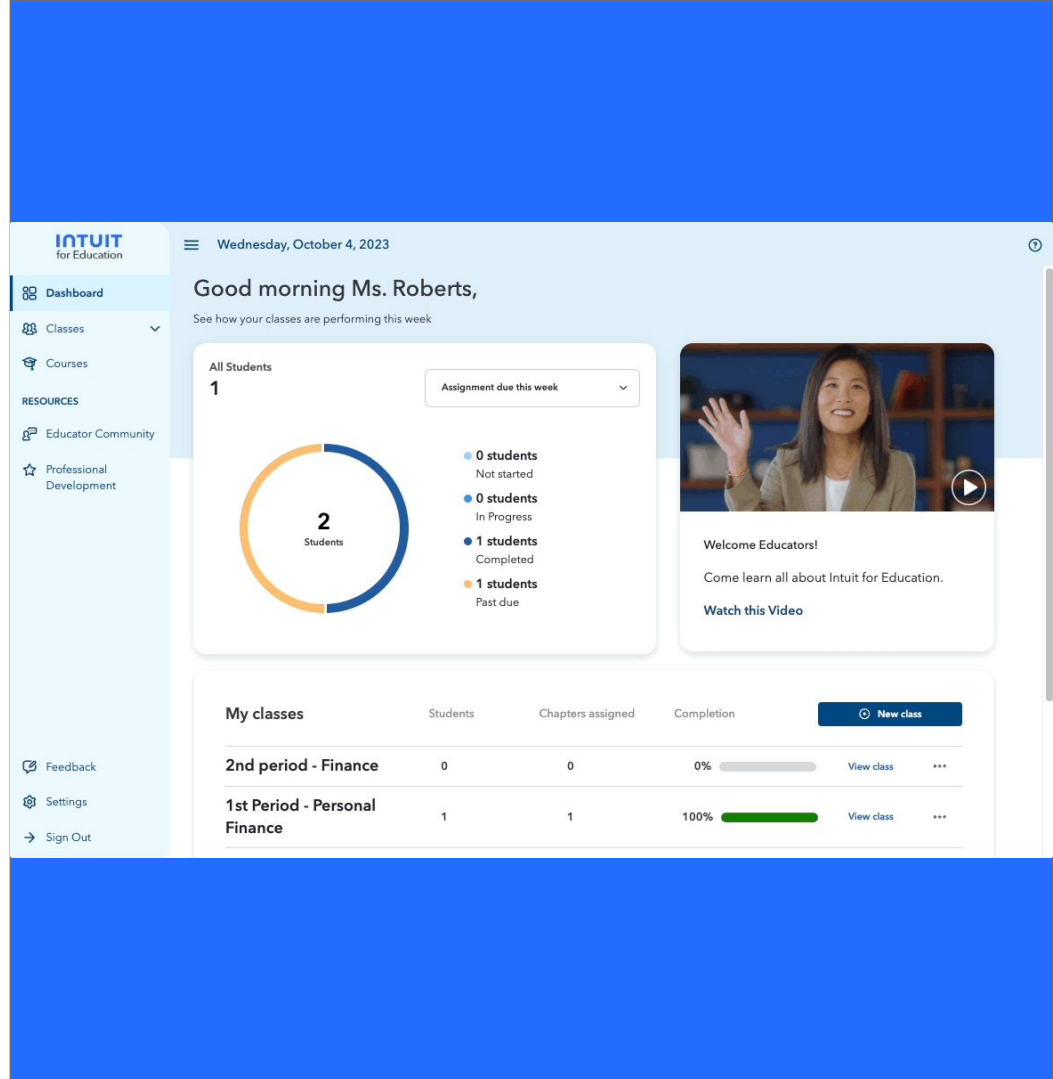
Remember me

By selecting Create account, you agree to our [Terms](#) and acknowledge our [Privacy Statement](#).

Invisible reCAPTCHA by Google [Privacy Policy](#) and [Terms of Use](#).

Create a Class

1. Click  **New class**
2. Enter the **class information**, then click **Next**.
3. Click **Done**.
4. Once you create a Class, it will be added to the **Classes menu on the left sidebar**.



The screenshot shows the Intuit for Education dashboard. The top navigation bar includes the Intuit logo, the date 'Wednesday, October 4, 2023', and a user profile icon. The left sidebar contains navigation options: Dashboard, Classes, Courses, Educator Community, Professional Development, Feedback, Settings, and Sign Out. The main content area displays a personalized greeting: 'Good morning Ms. Roberts, See how your classes are performing this week'. A central widget shows 'All Students 1' with a donut chart indicating '2 Students' (1 orange, 1 blue). A legend on the right lists: 0 students Not started, 0 students In Progress, 1 student Completed, and 1 student Past due. A dropdown menu is set to 'Assignment due this week'. To the right is a video player with a play button and the text 'Welcome Educators! Come learn all about Intuit for Education. Watch this Video'. Below this is a 'My classes' table with columns for Students, Chapters assigned, and Completion. A 'New class' button is located in the top right of the table area.

My classes	Students	Chapters assigned	Completion	
2nd period - Finance	0	0	0%	View class ...
1st Period - Personal Finance	1	1	100%	View class ...

Student View

1. Click **Courses** on the left.
2. Select a course.
3. Click **View chapter**
4. Navigate through the chapter elements to preview what students will see when they are logged in.

The screenshot displays the Intuit for Education dashboard for Wednesday, October 4, 2023. The left sidebar contains navigation options: Dashboard, Classes, Courses, Educator Community, Professional Development, Feedback, Settings, and Sign Out. The main content area features a greeting for Ms. Roberts and a performance overview for 'All Students' (1 student). A donut chart shows 2 students total, with a breakdown: 0 Not started, 0 In Progress, 1 Completed, and 1 Past due. A video player shows a welcome message from an educator. Below is a 'My classes' table with columns for Students, Chapters assigned, and Completion.

My classes	Students	Chapters assigned	Completion	
2nd period - Finance	0	0	0%	View class ...
1st Period - Personal Finance	1	1	100%	View class ...

Budget Activity | Part 1



Below, add a sticky note next to the budget philosophy you support and explain why. There is no wrong answer here. It's all your personal preference and conditions

50/30/20 Rule

*50% for needs
30% for wants
20% for savings/debt*



Pay yourself first

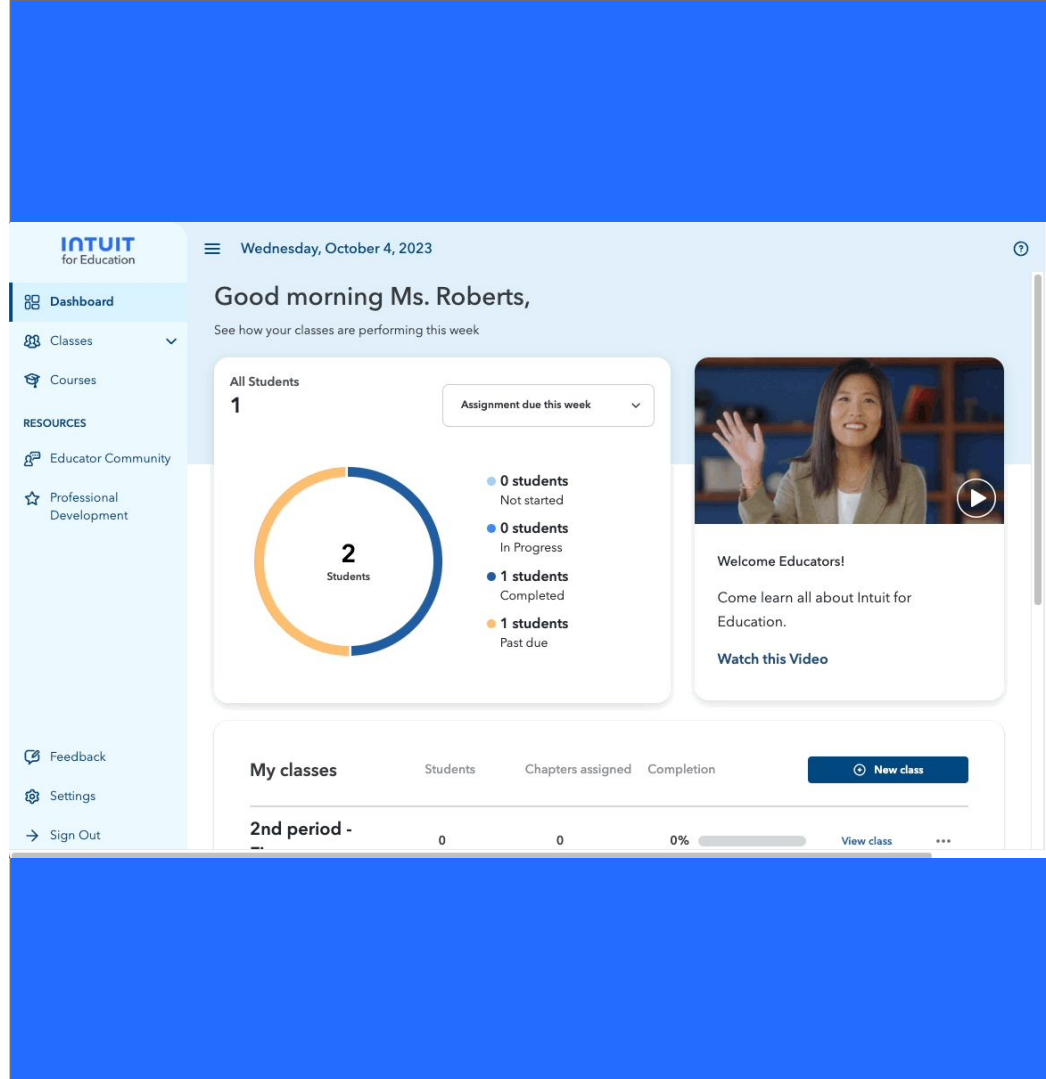
*Prioritize longterm
savings vs short-term
expenses*

Zero-Based

*Cap a certain amount
each money to spend*

Invite Students

1. Open a **Class**.
2. Click  **Manage** 
3. Click **Invite**.
4. Click **Copy**.
5. Click **Done**.
6. Paste the invite link into an email or share via your LMS.



The screenshot shows the Intuit for Education dashboard for Ms. Roberts on Wednesday, October 4, 2023. The dashboard includes a navigation sidebar with options like Dashboard, Classes, Courses, and Resources. The main content area displays a class overview for 'All Students' with a donut chart showing 2 students. A legend indicates: 0 students Not started, 0 students In Progress, 1 student Completed, and 1 student Past due. There is also a video player with a 'Watch this Video' button and a 'New class' button.

My classes	Students	Chapters assigned	Completion	
2nd period -	0	0	0%	View class ...


Assign Content

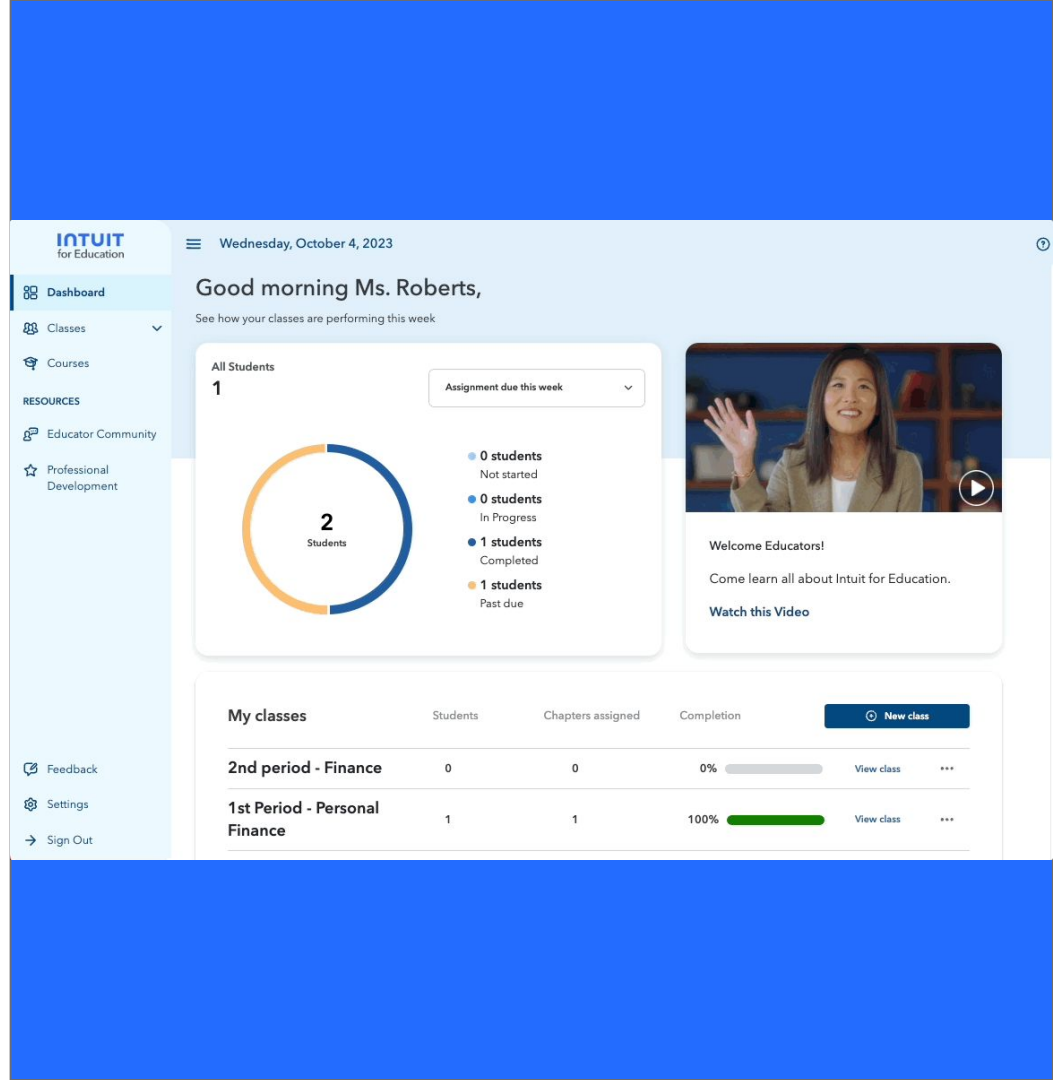
1. Click **Courses** on the left, then select a course.
2. Click the checkbox(es) for the chapter(s) you want to assign.
3. Click **Assign to my class**.
4. Select the class, start and end date for each chapter assigned.
5. Click **Next**, then **Confirm**.
6. Click **Done**.

The screenshot displays the Intuit for Education dashboard for Wednesday, October 4, 2023. The left sidebar contains navigation options: Dashboard, Classes (with a dropdown arrow), Courses, and Resources (Educator Community, Professional Development, Feedback, Settings, Sign Out). The main content area features a greeting: "Good morning Ms. Roberts, See how your classes are performing this week". A central widget shows "All Students 1" with a donut chart indicating "2 Students". A legend on the right lists: 0 students Not started, 0 students In Progress, 1 student Completed, and 1 student Past due. A "Watch this Video" section includes a video player and the text: "Welcome Educators! Come learn all about Intuit for Education. Watch this Video". At the bottom, a "My classes" table shows progress for two classes.

My classes	Students	Chapters assigned	Completion	
2nd period - Finance	0	0	0%	View class ...
1st Period - Personal Finance	1	1	100%	View class ...

Download Lessons

1. Click **Courses** on the left.
2. Select a course.
3. Click  **Download lessons**
4. Navigate to your Downloads folder on your computer.
5. Unzip the ZIP file to view the lesson files.
 - a. Resource Guide
 - b. Slide Deck
 - c. Worksheet(s)



The screenshot shows the Intuit for Education dashboard for Wednesday, October 4, 2023. The left sidebar contains navigation options: Dashboard, Classes, Courses, Educator Community, and Professional Development. The main content area displays a greeting to Ms. Roberts and a summary of class performance. A donut chart shows that 2 students are currently in progress. A legend indicates: 0 students Not started, 0 students In Progress, 1 student Completed, and 1 student Past due. Below this is a 'My classes' table with columns for Students, Chapters assigned, and Completion. A 'New class' button is visible in the top right of the table area.

My classes	Students	Chapters assigned	Completion	
2nd period - Finance	0	0	0%	View class ...
1st Period - Personal Finance	1	1	100%	View class ...

Intuit Educator Community

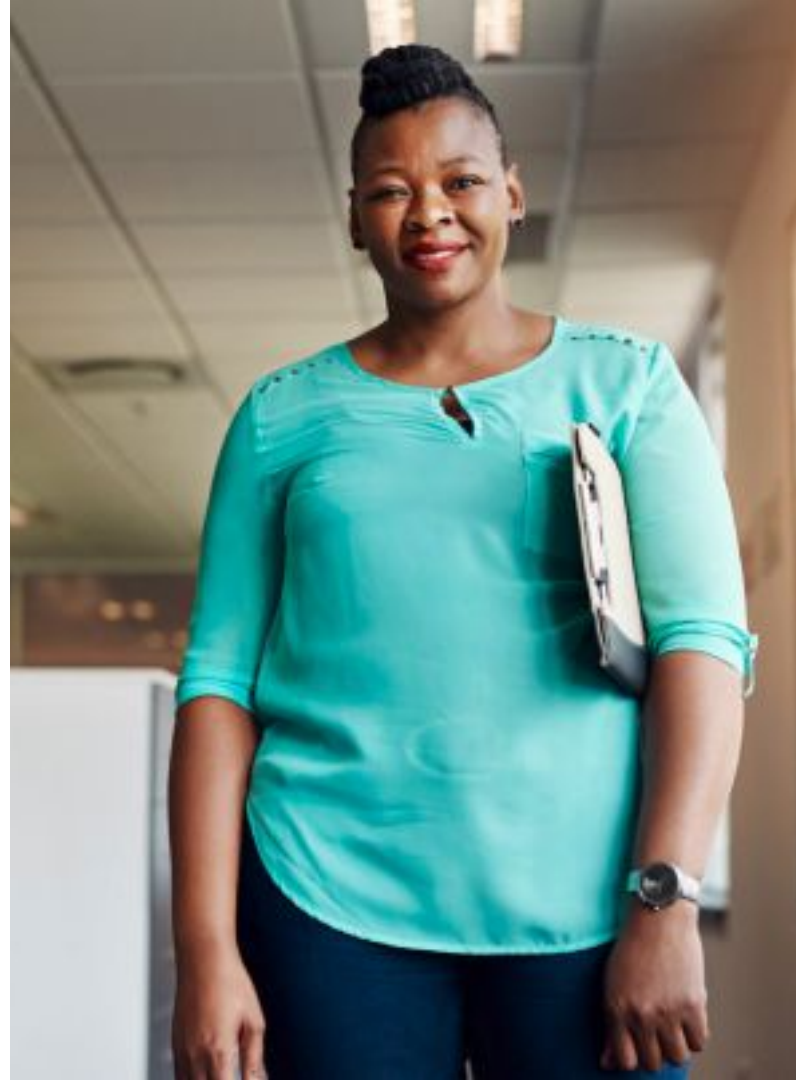
1. Click **Educator Community** on the left sidebar to join.

OR

Navigate to

educatorcommunity.intuit.com

2. Add a **username** to complete your profile, then click **Submit**.
3. Start interacting with educators from around the world!



Practice Guide for Prosperity Quest:

- Once in prosperityquest.intuit.com
- enter your nickname
- Select 'Prospera Tech Labs'
- Complete Month 1
- Share your 'financial report' with the group

prosperityquest.intuit.com?cid=evt_intuit_reach_us_intuit-for-education_aw_slid_e-deck_partners_link_na_intuit-edu



Don't forget to sign up
to Intuit for Education!



Take our survey!



Appendix

Young people vs money

Budget Activity | Part 2

Antonio is a 17 year old high school student from West Compton. He works at a boba shop 20 minutes away and makes \$15.50/hour for 15 hours per week. This means Antonio makes \$232.50 per week, which is reduced to \$177.50 per week when considering California's federal income, state income, social security, and medicare taxes

Below, work together to calculate Antonio's **monthly** budget. Assume that Antonio's family cannot help him with expenses this month so he is on his own.



Expense	Cost
Help family with rent payment	
Savings for college or trade school	
Eating out	
Clothes	
Games/entertainment	
Transportation to work	
Health insurance	
Phone bill	
Savings	

Intuit for Education Highlights here

Topics

- Importance of financial literacy
- Making money decisions
- Banking
- Budgeting
- Savings
- Credit
- Investing
- Career planning
- Paying for college
- Insurance
- Taxes
- Economics
- Entrepreneurial finance

How it works

- Create classes for your students to learn synchronously and asynchronously
- Assign quizzes, homework
- Track student progress
- View student experience
- Short videos to per unit
- Flexible curriculum
- Financial literacy badges

Professional development offerings

- Educator community
- Educator training resources
- Live webinar and on-demand library of resources

Intuit Personal Finance Certification with Certiport (separate offering from Intuit for Education)

While Intuit for Education is 100% free, certification is offered through a third party, Certiport, and fees may apply based on your state and district. For questions, contact your administrator.

Gen Z place high value in financial wellness

Understanding young people's *relationship* to money informs how we teach financial literacy

From Intuit's research on Gen-Z money habits

- 57% of Americans feel anxious going with friends to restaurants and bars they know they can't afford **(70% for Gen Z)**.
- Nearly half of Americans (48%) say they've spent less time with friends or family due to financial constraints **(61% for Gen Z)**
- Young people are **more entrepreneurial** and dedicate time to side hustles

From Quizlet's study on Gen-Z

They view education as a means to an end rather than a status statement, citing minimizing debt as the #1 factor when selecting a higher education path. They also factor work-life balance and mental health into planning for future stability. They prefer in person experiences to build relationships and foster a sense of community for career opportunities and better mental health.

Cite:
<https://investors.intuit.com/news/news-details/2023/Gen-Z-Would-Rather-Talk-About-Anything-But-Their-Finances/default.aspx>

Financial literacy education

The current problem 🥵🙄

Financial literacy education is not equitably distributed across all school districts

28 states have some level of personal finance graduation requirement

17 states have mandates in place for students to take a full semester personal finance course to graduate, while **11 states** require personal finance be taught as part of another course.

Students are not graduating financially literate

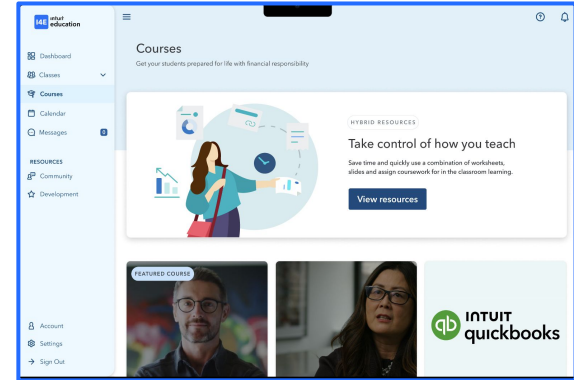
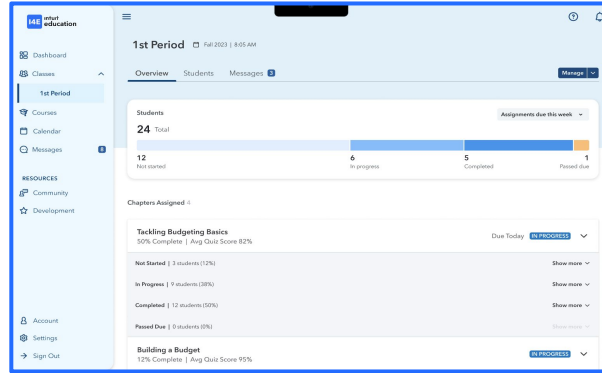
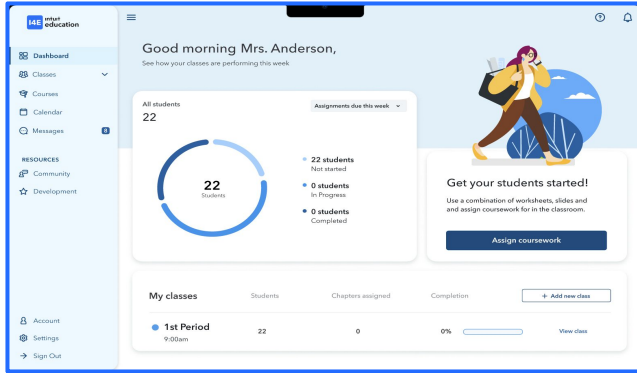
Only 25% of all H.S. students are required to take a personal finance course and that percentage is significantly lower for students in low-income zip codes.

The learning environment negatively impacts students' ability to learn

Only 25% of high school students feel engaged by school due to the typical lecture-based format.

Intuit believes **all students**, regardless of the zip code they are in, deserve the opportunity to be financially literate.

Intuit for Education: Financial Literacy available to everyone - free



🌟🌟 Teach financial literacy using real-world tools 🌟🌟

TurboTax simulation - Mint simulation - Credit Karma simulation Mailchimp simulation - Quickbooks practice

🎮🎮 Engage students with education games to enhance the learning experience 🎮🎮
Kahoots for individual units | Gamified experience like leaderboards, music, and timers

Our differentiators for educators - Intuit for Education

By offering a free and easy-to-use technical resource, educators can teach personal finance without taking too much class time

Real World Application 🙌

Intuit for Education teaches students how to use real world financial tools, helping them build skills that will translate into real use cases.

Flexible Curriculum 🌟

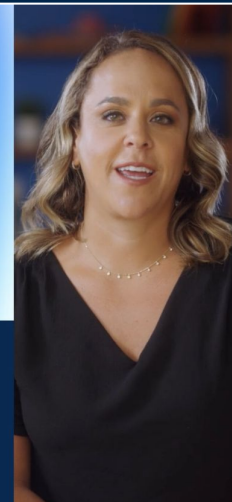
Intuit for Education's lessons are designed to easily flex to any time frame - from an independent homework assignment or hour long segment, to a guided multi-week unit or a semester-long course.

Gamification Solutions 🙌

Intuit for Education leverages gamification through our personal finance game - *Prosperity Quest*; Web3D game where students can explore concepts like credit, loans, savings, and investments to get them excited about financial education.

View: Intuit for Education How to Video

How-To:
Create a Class and
Invite Students



Check out our how to videos:

https://www.intuit.com/solutions/education/resources/support/?cid=evt_intuit_reach_us_intuit-for-education_aw_slide-deck_partners_link_na_intuit-edu

View:
Intuit for
Education
Content Video



Sign up for Intuit for Education:

https://education.intuit.com/register?cid=evt_intuit_reach_us_intuit-for-education_aw_slide-deck_partners_link_na_intuit-edu



View: Intuit for Education Simulation

Sales tax calculator: Find rates in your area

Easily calculates sales tax rates in your state with our free tool. Simply plug in your business address and ZIP code to reveal your total estimated tax rate.

Business address [Clear address](#)

Address

City Choose a state

ZIP

*Enter the full U.S. street address for the most accurate rate.

[Get rate estimate](#)

This free service is for illustrative purposes only without warranties. If you intend to rely on these rates, please utilize QuickBooks Sales Tax.

0.00%
TOTAL ESTIMATED TAX RATE

0.00%

0.00%

QuickBooks: Understanding Sales Taxes

Please note that in this QuickBooks simulation, some features and links have been disabled so that you can focus on learning objectives of this activity.

QuickBooks is a tool used by businesses to manage income and expenses. This includes collecting sales tax. For business owners, knowing whether you need to charge sales tax is—no surprise!—pretty complex. Especially when sales tax laws make for dry reading and can differ from state to state.

Let's look at the sales tax calculator to see how sales tax varies by location.

Instructions:

Skip the address box.

- 1 - Enter **San Diego** as the city.
- 2 - Enter **California** as the state.
- 3 - Enter **92101** as the zip code.

Sign up for Intuit for Education:

https://education.intuit.com/register?cid=evt_intuit_reach_us_intuit-for-education_aw_slide-deck_partners_link_na_intuit-edu

View: Intuit for Education Assessment

QUESTION 1 / 100

Measure your growth

Why should you learn to handle your money wisely?

- So you can meet your goals and financial objectives
- To become a pro at investing
- To show others you know how to handle your finances
- To avoid paying taxes on what you earn

Submit

Sign up for Intuit for Education:

https://education.intuit.com/register?cid=evt_intuit_reach_us_intuit-for-education_aw_slide-deck_partners_link_na_intuit-edu

Intuit for Education Helping students become financially literate

Intuit for Education offers flexible and interactive curriculum with real world tools, to get students excited about finances

Real World Tools

Confidence

Feel confident that students are prepared to transition to managing their own finances

Apply To Real Life Scenarios

Give students the ability to apply what they've learned to a real world scenarios that they'll encounter as young adults

Credible, & single, Source of Truth

I4E provides a source of truth for financial basics and hot topics, like investing and online banking

Learn, Apply, Assess

I4E helps students apply what they learned and offers assessments to make sure it's resonating with them

Certifications Launch Timing Oct

Teachers can leverage our industry recognized Intuit Personal Finance Certification

Flexibility

Comprehensive Curriculum

Select from turn key personal finance and/or entrepreneurial courses

Differentiated Instruction

Build and pace programs to meet your student's needs and learning style

Hybrid Learning

Whether it's homework or in the classroom, I4E curriculum is designed to support guided or independent environments.

Flexible Ways to Meet Requirements

Designed to meet state mandates and national standards, I4E curriculum can flex anywhere 15 min lesson to full semester course.

Accessibility Across HS Students

I4E is designed to be accessible across all High School reading levels

Interactive

Relevant Applications

Students are excited to learn since lessons are tailored to topics that they can start applying immediately

Dynamic Curriculum

Curriculum is comprised of dynamic videos, simulations, reflections, drag & drop, quizzes, true/false, sort & order

Professional Development

We've got your back for teaching financial literacy, from live webinars to a robust library of quick how-to videos & articles

Educator Community

Connect with your peers to share learnings as your bring financial literacy to your classroom

Gamification FY24 Launch

I4E uses leaderboards, timers, and game-style music to simulate friendly in-class competition