

<b>CHAPTER 15</b>	<b>LESSON PLANS</b>
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**The Basics of Retirement Planning**      *Section 15.1 (pp. 476–485)*

**OBJECTIVES**

- How to recognize the importance of estate planning
- How to estimate your retirement living costs
- How to identify your retirement housing needs

**STATE/LOCAL OBJECTIVES**

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**Focus**

- \_\_\_\_\_ Motivation, p. TM 210
- \_\_\_\_\_ Prereading, p. TM 210
- \_\_\_\_\_ Springboard, TAE, p. 477
- \_\_\_\_\_ Topic Spotlight, p. TM 209
- \_\_\_\_\_ PowerPoint Presentation

**Independent Practice**

- \_\_\_\_\_ Independent Practice, p. TM 210
- \_\_\_\_\_ Student Activity Workbook

**Extending the Content**

- \_\_\_\_\_ Extension, TAE, p. 485
- \_\_\_\_\_ Internet Extension, p. TM 208
- \_\_\_\_\_ Additional Resources, p. TM 209

**Teach**

**Guided Practice**

- \_\_\_\_\_ Guided Practice, p. TM 210
- \_\_\_\_\_ Standard & Poor's Q & A, TAE p. 476
- \_\_\_\_\_ Discussion, TAE, p. 478
- \_\_\_\_\_ Discussion, TAE, p. 478
- \_\_\_\_\_ Respond, TAE, p. 478
- \_\_\_\_\_ What's Your Financial ID?, TAE, p. 478
- \_\_\_\_\_ Critical Thinking, TAE, p. 479
- \_\_\_\_\_ Critical Thinking, TAE, p. 480
- \_\_\_\_\_ Question, TAE, p. 481
- \_\_\_\_\_ Critical Thinking, TAE, p. 481
- \_\_\_\_\_ Reinforcement, TAE, p. 482
- \_\_\_\_\_ Careers in Finance, TAE, p. 483, p. TM 210
- \_\_\_\_\_ Answers to Reading Strategies, p. TM 217

**Assess**

**Reteaching**

- \_\_\_\_\_ Reteaching, p. TM 210

**Enrichment**

- \_\_\_\_\_ Enrichment, p. TM 210
- \_\_\_\_\_ Enrichment/Application, p. TM 208

**Assessment**

- \_\_\_\_\_ Section 15.1 Assessment, TAE, p. 485, p. TM 210
- \_\_\_\_\_ Section 15.1 Assessment Answers, p. TM 213

**Close**

- \_\_\_\_\_ Close, p. TM 210

**Homework Assignments**

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Teacher's Name \_\_\_\_\_ Date \_\_\_\_\_

Class \_\_\_\_\_ Week \_\_\_\_\_ M T W TH F

# CHAPTER 15

# LESSON PLANS

## The Basics of Retirement Planning

*Section 15.1 (pp. 476–485)*

### Internet Sites

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### Lesson Strategies

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### Equipment and Special Materials Needed

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### Homework Assignments

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<b>CHAPTER 15</b>	<b>LESSON PLANS</b>
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**Planning Your Retirement Income** **Section 15.2 (pp. 486–498)**

**OBJECTIVES**

- How to describe the role of Social Security in planning for retirement
- How to discuss the retirement benefits offered under employer pension plans
- How to distinguish among various personal retirement plans
- How to plan the best use of retirement income

**STATE/LOCAL OBJECTIVES**

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**Focus**

- \_\_\_\_\_ Motivation, p. TM 210
- \_\_\_\_\_ Prereading, p. TM 211
- \_\_\_\_\_ Springboard, TAE, p. 487
- \_\_\_\_\_ PowerPoint Presentation

**Independent Practice**

- \_\_\_\_\_ Independent Practice, p. TM 211
- \_\_\_\_\_ Student Activity Workbook

**Teach**

**Guided Practice**

- \_\_\_\_\_ Guided Practice, p. TM 211
- \_\_\_\_\_ Reinforcement, TAE, p. 487
- \_\_\_\_\_ Connect, TAE, p. 487
- \_\_\_\_\_ Math Problem, TAE, p. 487
- \_\_\_\_\_ Predict, TAE, p. 488
- \_\_\_\_\_ Critical Thinking, TAE, p. 488
- \_\_\_\_\_ Discussion, TAE, p. 488
- \_\_\_\_\_ Academic Connection, TAE, p. 489
- \_\_\_\_\_ International Finance, TAE, p. 491, p. TM 211
- \_\_\_\_\_ Cooperative Learning, TAE, p. 491
- \_\_\_\_\_ Standard & Poor's Case Study, TAE, p. 494
- \_\_\_\_\_ Savvy Saver, TAE, p. 495, p. TM 211
- \_\_\_\_\_ Answers to Reading Strategies, p. TM 217
- \_\_\_\_\_ Answers to Standard & Poor's Case Study, p. TM 217

**Extending the Content**

- \_\_\_\_\_ Extension, TAE, p. 488
- \_\_\_\_\_ Extension, TAE, p. 489
- \_\_\_\_\_ Extension, TAE, p. 497

**Assess**

**Reteaching**

- \_\_\_\_\_ Reteaching, p. TM 211

**Enrichment**

- \_\_\_\_\_ Enrichment, p. TM 211

**Assessment**

- \_\_\_\_\_ Section 15.2 Assessment, TAE, p. 498, p. TM 211
- \_\_\_\_\_ Section 15.2 Assessment Answers, p. TM 214

**Close**

- \_\_\_\_\_ Close, p. TM 211

**Homework Assignments**

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# CHAPTER 15

# LESSON PLANS

## Planning Your Retirement Income

*Section 15.2 (pp. 486–498)*

### Internet Sites

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### Lesson Strategies

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### Equipment and Special Materials Needed

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### Homework Assignments

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<b>CHAPTER 15</b>	<b>LESSON PLANS</b>
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## Estate Planning

## Section 15.3 (pp. 499–511)

### OBJECTIVES

- How to distinguish among various types of formats of wills
- How to discuss several types of trusts
- How to describe common characteristics of estates

### STATE/LOCAL OBJECTIVES

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### Focus

- \_\_\_\_\_ Motivation, p. TM 212
- \_\_\_\_\_ Prereading, p. TM 212
- \_\_\_\_\_ Springboard, TAE, p. 500
- \_\_\_\_\_ PowerPoint Presentation

### Independent Practice

- \_\_\_\_\_ Independent Practice, p. TM 212
- \_\_\_\_\_ Student Activity Workbook

### Extending the Content

- \_\_\_\_\_ Extension, TAE, p. 501
- \_\_\_\_\_ Extension, TAE, p. 504

### Teach

#### Guided Practice

- \_\_\_\_\_ Guided Practice, p. TM 212
- \_\_\_\_\_ Reinforcement, TAE, p. 500
- \_\_\_\_\_ Discussion, TAE, p. 500
- \_\_\_\_\_ Reinforcement, TAE, p. 502
- \_\_\_\_\_ Critical Thinking, TAE, p. 504
- \_\_\_\_\_ Predict, TAE, p. 504
- \_\_\_\_\_ Cooperative Learning, TAE, p. 506
- \_\_\_\_\_ Common Cents, TAE, p. 507, p. TM 212
- \_\_\_\_\_ Cooperative Learning, TAE, p. 507
- \_\_\_\_\_ Respond, TAE, p. 509
- \_\_\_\_\_ Answers to Reading Strategies, p. TM 217

### Assess

#### Reteaching

- \_\_\_\_\_ Reteaching, p. TM 212

#### Enrichment

- \_\_\_\_\_ Enrichment, p. TM 212

#### Assessment

- \_\_\_\_\_ Section 15.3 Assessment, TAE, p. 511, p. TM 212
- \_\_\_\_\_ Section 15.3 Assessment Answers, p. TM 214

### Close

- \_\_\_\_\_ Close, p. TM 212

### Homework Assignments

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# CHAPTER 15

# LESSON PLANS

## Estate Planning

## Section 15.3 (pp. 499–511)

### Internet Sites

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### Lesson Strategies

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### Equipment and Special Materials Needed

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### Homework Assignments

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# CHAPTER 15

# LESSON PLANS

## Taxes and Estate Planning

## Section 15.4 (pp. 512–517)

### OBJECTIVES

- How to identify the types of taxes that affect estates
- How to assess strategies for paying taxes

### STATE/LOCAL OBJECTIVES

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### Focus

- \_\_\_\_\_ Motivation, p. TM 212
- \_\_\_\_\_ Prereading, p. TM 213
- \_\_\_\_\_ Springboard, TAE, p. 512
- \_\_\_\_\_ *Powerpoint Presentation*

### Enrichment

- \_\_\_\_\_ Enrichment, p. TM 213

### Assessment

- \_\_\_\_\_ Section 15.4 Assessment, TAE, p. 515, p. TM 213
- \_\_\_\_\_ Section 15.4 Assessment Answers, p. TM 215

### Teach

#### Guided Practice

- \_\_\_\_\_ Guided Practice, p. TM 213
- \_\_\_\_\_ Math Problem, TAE, p. 512
- \_\_\_\_\_ Reinforcement, TAE, p. 512
- \_\_\_\_\_ Critical Thinking, TAE, p. 513
- \_\_\_\_\_ Question, TAE, p. 513
- \_\_\_\_\_ Your Financial Portfolio, TAE, p. 514
- \_\_\_\_\_ Connect, TAE, p. 515
- \_\_\_\_\_ Answers to Reading Strategies, p. TM 217

#### Chapter 15 Assessment, TAE, p. 516

- \_\_\_\_\_ Chapter Summary
- \_\_\_\_\_ Understanding and Using Vocabulary
- \_\_\_\_\_ Review Key Concepts
- \_\_\_\_\_ Apply Key Concepts
- \_\_\_\_\_ Problem Solving Today
- \_\_\_\_\_ Real-World Application
- \_\_\_\_\_ Finance Online
- \_\_\_\_\_ Chapter 15 Assessment Answers, p. TM 216

#### Independent Practice

- \_\_\_\_\_ Independent Practice, p. TM 213
- \_\_\_\_\_ *Student Activity Workbook*

#### Testing

- \_\_\_\_\_ Chapter 15 Reproducible Test, *Teacher's Resource Binder*

#### Extending the Content

- \_\_\_\_\_ Extension, TAE, p. 512
- \_\_\_\_\_ Extension, TAE, p. 512

#### Close

- \_\_\_\_\_ Close, p. TM 213

### Assess

#### Reteaching

- \_\_\_\_\_ Reteaching, p. TM 213

### Homework Assignments

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Teacher's Name \_\_\_\_\_ Date \_\_\_\_\_

Class \_\_\_\_\_ Week \_\_\_\_\_ M T W TH F

# CHAPTER 15

# LESSON PLANS

## Taxes and Estate Planning

## Section 15.4 (pp. 512–517)

### Internet Sites

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### Lesson Strategies

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### Equipment and Special Materials Needed

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### Homework Assignments

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