

Program Syllabus

Program Title: Know Yourself, Grow Your WealthSM

Prerequisites: None

Program Description:

Know Yourself, Grow Your WealthSM is a holistic personal financial education program designed to empower learners to understand how they think and feel about money, and how to apply their knowledge to obtain a healthy economic lifestyle.

Learning Objectives:

Upon successful completion of this program, you will confidently be able to:

- Define basic financial concepts and terms.
- Describe how to open diverse types of accounts to engage with your finances.
- Identify sources of financial stress.
- Design strategies for healthy coping mechanisms to enhance financial wellbeing.

Program Outline:

Module 1: Know Yourself

- Lesson 1: Financial Wellness and You
- Lesson 2: Goals, Values, and Priorities
- Lesson 3: You and Money
- Module 1 Discussion
- Module 1 Knowledge Check

Module 2: Financial Wellness

- Lesson 1: Mindset Mastery
- Lesson 2: It's a Miracle
- Lesson 3: Small Steps to Big Outcomes
- Module 2 Discussion
- Module 2 Knowledge Check

Module 3: Cash Flow

- Lesson 1: Budgeting in Action
- Lesson 2: How Much Does It Cost to Be You?

- Lesson 3: Myths about Budgeting
- Module 3 Discussion
- Module 3 Knowledge Check

Module 4: Financial Ratios

- Lesson 1: Calculating Net Worth
- Lesson 2: Basic Financial Ratios
- Lesson 3: Using Ratios to Check-in
- Module 4 Discussion
- Module 4 Knowledge Check

Module 5: Credit

- Lesson 1: Credit Basics
- Lesson 2: Credit Matters
- Lesson 3: Credit Costs
- Module 5 Discussion
- Module 5 Knowledge Check

Module 6: Debt Strategies

- Lesson 1: Bad vs. Good Credit
- Lesson 2: Managing Credit and Debt
- Lesson 3: Student Loan Borrowing
- Lesson 4: Student Load Repayment
- Lesson 5: Debt Repayment Strategies
- Module 6 Discussion
- Module 6 Knowledge Check

Module 7: Housing

- Lesson 1: Housing Choices
- Lesson 2: Homeownership
- Lesson 3: Moving after Mortgage
- Module 7 Discussion
- Module 7 Knowledge Check

Module 8: Taxation

- Lesson 1: Tax Filing Status
- Lesson 2: Advantages Accounts and Gross Income
- Lesson 3: Deductions and Credit
- Lesson 4: Tax Strategies
- Module 8 Discussion
- Module 8 Knowledge Check

Module 9: Introduction to Investing

- Lesson 1: Investing Your Goals
- Lesson 2: Stocks, Bonds, Mutual Funds and Exchange Traded Funds (ETFs)
- Lesson 3: Risk Profile and Investment Goals
- Module 9 Discussion

- Module 9 Knowledge Check

Module 10: Investor Education

- Lesson 1: Investor Education
- Lesson 2: Let's Invest and Employee Benefit Analysis
- Lesson 3: Trading Platforms and Cryptocurrency
- Module 10 Discussion
- Module 10 Knowledge Check

Module 11: Protection and Risk Management

- Lesson 1: Risks Across the Lifespan
- Lesson 2: Protecting Yourself
- Lesson 3: Protecting Your Assets
- Lesson 4: Protecting Your Retirement
- Module 11 Discussion
- Module 11 Knowledge Check

Module 12: Legacy

- Lesson 1: Property Transfer Tools and Strategies
- Lesson 2: Essential Estate Planning Documents
- Module 12 Knowledge Check

Module 13: The Big Picture

- Lesson 1: Pulling It All Together
- Lesson 2: Checking and Updating your Plan
- Lesson 3: Global Thinking, Grace, and Gratitude
- Post-Program Survey

Learning Community

This program offers a learning community for you to engage with your peers and discuss financial education concepts and their application to the real world. You are strongly encouraged to participate in the learning community to enhance your overall learning experience.

Evaluation Procedures

Module Knowledge Checks: The knowledge check is a multiple-choice quiz that evaluates your understanding of module topics. You must earn a score of 80% or better on each knowledge check to complete the module successfully.

Course Policies

This self-paced, virtual certificate program is delivered on The American College of Financial Service's learning management system. To assist you on your learning journey at The College, review [The American College of Financial Services course policies](#).

Technical Support

For technical support, access the support link in the classroom or contact the Institute for Learning Innovation by email: Innovation@theamericancollege.edu.