

BIZWIZTM

Version 2.0

Student Name: _____

Team Name: _____

INVESTMENT TEAM PACKET

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What's in a Name?

Directions: Complete the following in reference to your team name.

1. Identify three examples of team names that were suggested by you or your team members.

a. _____

b. _____

c. _____

2. Which of the names identified above did you and your team members decide upon for a name?

Team Name: _____

3. Why did you and/or your team members feel this was the best choice?

4. Identify one of the alternative names listed above (question #1) and explain why you and/or your team members decided it was NOT the best choice.

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Investment Contract

As a member of this investment team, I agree to perform all my job responsibilities, as explained to me and outlined by my teacher, to the best of my ability. I will consistently display conduct appropriate to business and hold myself in accordance with the expectations of this classroom.

As part of this investment team, I agree to:

- Cooperate and help out as requested by other members of the investment team to maximize profitability.
- Participate and be a member of the team strategizing, investing, buying, selling, and documenting throughout the investment year.
- Maintain accurate daily records of team finances and investment decisions.

Signed this day by myself and the witnesses below:

Managing Director *Date*

Controller *Date*

Analyst *Date*

Trader *Date*

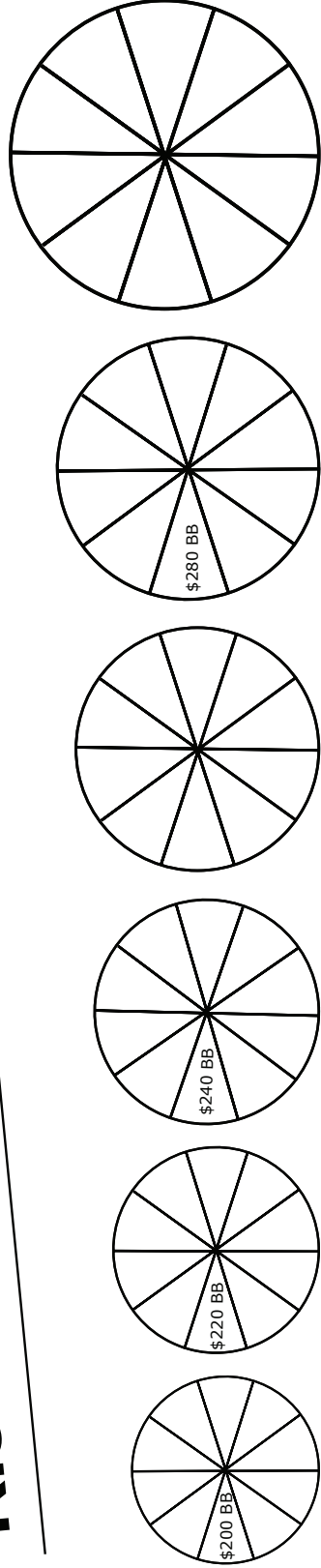
Analyst *Date*

Trader *Date*

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Investment Pie Chart:
Goal Setting as % Return on Investment (ROI)

RISK: As return grows, so does risk!









	Initial Investment	10% ROI	20% ROI	30% ROI	40% ROI	50% ROI
Value						
Whole Pie:	\$2,000 BB	\$2,200 BB	\$2,400 BB	\$2,600 BB	\$_____ BB	\$_____ BB
Piece of Pie:	\$200 BB	\$220 BB	\$240 BB	\$_____ BB	\$280 BB	\$_____ BB

Can you figure out the missing values in the patterns?

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Setting a Goal! (Part 1)

A goal is a clearly defined objective that can be reached within a given period of time. Look at the list of long-term goals and choose one for your team or make one of your own! Remember to look carefully at the cost of the financial goal associated with each long-term goal. The more expensive the goal, the more risky you will have to be with your investing. The riskier you are, the greater the chance of making money, but the greater the chance of losing money, too. After choosing your long-term goal, calculate your return goal and %ROI.

	<p>Start a Business! Your goal is to earn enough money to start a business with your team.</p>	<p>Financial Goal: \$2,200 BB Initial Investment: \$2,000 BB</p> <p>Return Goal: _____ %ROI _____</p>
	<p>A Day at the Amusement Park! Your goal is to earn enough money to treat your whole class to a day at the world's biggest amusement park!</p>	<p>Financial Goal: \$2,400 BB Initial Investment: \$2,000 BB</p> <p>Return Goal: _____ %ROI _____</p>
	<p>American Idol Tour! Your goal is to earn enough money to go on tour with <i>American Idol</i> and meet all the contestants in person!</p>	<p>Financial Goal: \$2,600 BB Initial Investment: \$2,000 BB</p> <p>Return Goal: _____ %ROI _____</p>
	<p>Shopping Spree! Your goal is to earn enough money to buy whatever you want at the shopping mall!</p>	<p>Financial Goal: \$2,800 BB Initial Investment: \$2,000 BB</p> <p>Return Goal: _____ %ROI _____</p>
	<p>Meet Your Favorite Celebrity! Your goal is to earn enough money to spend a day with your favorite celebrity!</p>	<p>Financial Goal: \$3,000 BB Initial Investment: \$2,000 BB</p> <p>Return Goal: _____ %ROI _____</p>
	<p>Set Your Own Goal! Choose your own goal and figure out how much money your team will need to reach it. Donate to charity, save for college, take a trip, whatever you want! Aim high! Your goal should be between \$2,050-\$3,000 BB.</p>	<p>Financial Goal: \$_____ BB Initial Investment: \$2,000 BB</p> <p>Return Goal: _____ %ROI _____</p>



Setting a Goal! (Part 2)

Setting Your Investment Goal

An investment goal is based on ROI (return on investment), which is the amount of money investments earn over time. Using the Investment Pie Chart, you will now determine your financial goal as a percentage of your initial investment (% ROI).

What is your goal?

How much money do you need to achieve it?

_____BB

What is your investment goal?

_____ % ROI

What kind of risk tolerance will you exercise when creating your investment strategy?

risk averse

risk neutral

risk tolerant



Trading Rules

1. Each trading session will last for six minutes.
2. Controllers and Analysts should remain at their table during the trading session.
3. Only Traders may move around the room to buy investments from other teams and buy/sell with the Investment Firm.
4. Managing Directors are responsible for making sure their team members are doing their jobs during the trading sessions.
5. Each team must make a minimum of TWO trades per session. A trade is defined as the purchase or sale of an investment.
6. Each team must make at least ONE trade with another team.
7. Prices are determined by the last posted value on the BizWiz Big Board.
8. A service fee of \$10 BB per investment type will be charged for trades made with the investment firm.
9. Service fees are not charged for the purchase of insurance.
10. Failure to comply with the above trading rules will result in a fine of \$50 BB per violation.



Trading Period Responsibilities

During each trading period, each team member has specific responsibilities.

Managing Director

- Ensures that team members know what they are responsible for
- Ensures that team members remain focused on their tasks
- Does final accuracy checks and initials trading ledgers
- Takes responsibility for Investment Team Packet

Controller

- Responsible for Cash on Hand
- Collects all Buy/Sell tickets from Trader and Analyst and ensures that they are completed with accuracy
- Records and reconciles buying and selling transactions on trading ledgers

Analyst

- Pays close attention to changing investment values throughout the trading session and makes spontaneous decisions if needed
- Makes “sell” trades to other teams during the trading session
- Gives Buy/Sell tickets to the Controller for reconciliation

Trader

- Represents the team in buying investments from other teams
- Represents the team in buying and selling investments with the Investment Firm
- Follows the trade plan set by the team and the prices set by the Analyst
- Gives Buy/Sell tickets to the Controller for reconciliation
- Monitors fluctuating prices carefully during the trading session to inform decision-making (“Buy low, Sell high!”)

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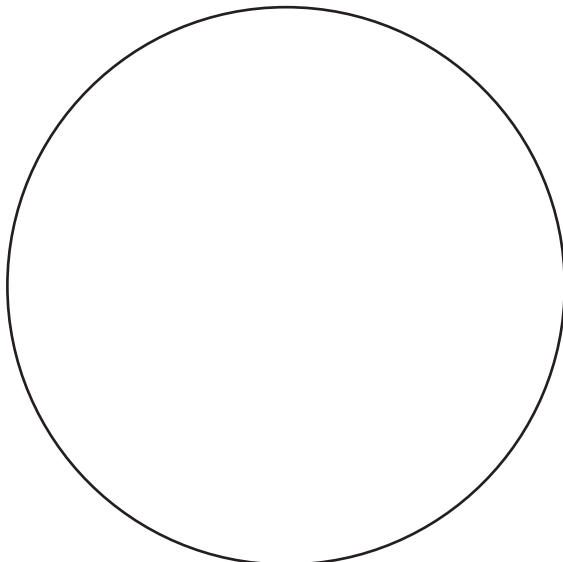
Q1 Allocation Plan

Your allocation plan is your purchase plan for each trading quarter. Think about your goal, your risk tolerance, and the economic forecast, and record your investments on the table and graph below. All prices and quantities are estimates and do not include fees.

Financial Goal	BB
Return Goal	BB
% ROI	%

Initial Investment	BB
Parent/Guardian Letters	BB
Initial Portfolio Value	BB

Investment Type	Forecasted Quantity	Trade Plan (B or S)	Price Estimate	Total Value (forecasted quantity x price)
Stock				
Venture Capital				
Collectibles				
Real Estate				
Bonds				
CDs				
Subtotal				
Cash on Hand				
Initial Portfolio Value				BB



Investment Type	Planned % of Portfolio
Stock	
Venture Capital	
Collectibles	
Real Estate	
Bonds	
CDs	
Cash	
Total	100%

Team Name: _____

Goal Tracking

1. What is the team's financial goal? _____ **BB**
2. What is the team's initial portfolio value? (See Q1 Allocation Plan) _____ **BB**
3. Total BizBucks needed to reach the team's financial goal = BB Distance to Goal

Trading Record

4. How many BizBucks does the team have on hand for the start of the first trading session? BB Starting Cash
(See line above) Count the team's BizBucks to confirm this value.

	Investment Type	Bought (B) or Sold (S)	Quantity	Price per Investment	Subtotal (Quantity x Price)	Service Fee (+ / -)	Total (+ / -)	Balance (Cash on Hand)
2 trades minimum								

5. How many BizBucks does the team have on hand at the end of the first trading session? BB Ending Cash

Checked by MD _____

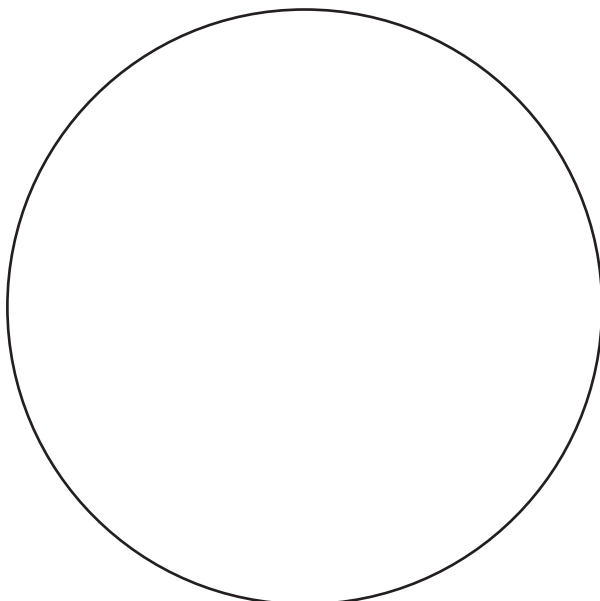
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Q2 Allocation Plan

Your allocation plan is your purchase plan for each trading quarter. Think about your goal, your risk tolerance, and the economic forecast, and record your investments on the table and graph below. All prices and quantities are estimates and do not include fees.

Financial Goal		BB
Current Portfolio Value	-	BB
Distance to Goal		BB

Investment Type	Quantity on Hand	Forecasted Quantity	Trade Plan (B or S)	Price	Total Value (forecasted quantity x price)
Stock					
Venture Capital					
Collectibles					
Real Estate					
Bonds					
CDs					
Subtotal					
Cash on Hand					
Portfolio Value					BB



Investment Type	Planned % of Portfolio
Stock	
Venture Capital	
Collectibles	
Real Estate	
Bonds	
CDs	
Cash	
Total	100%

Team Name: _____

Goal Tracking

24. What is the team's financial goal? _____ **BB**
25. What is the team's current portfolio value? (See line 22 on Finance Worksheet 1) - _____ **BB**
26. Total BizBucks needed to reach the team's financial goal = **BB** Distance to Goal

Trading Record

27. How many BizBucks does the team have on hand for the start of the second trading session? **BB** Starting Cash
 (See line above) Count the team's BizBucks to confirm this value.

	Investment Type	Bought (B) or Sold (S)	Quantity	Price per Investment	Subtotal (Quantity x Price)	Service Fee (+ / -)	Total (+ / -)	Balance (Cash on Hand)
2 trades minimum								

28. How many BizBucks does the team have on hand at the end of the second trading session? **BB** Ending Cash

Checked by MD _____

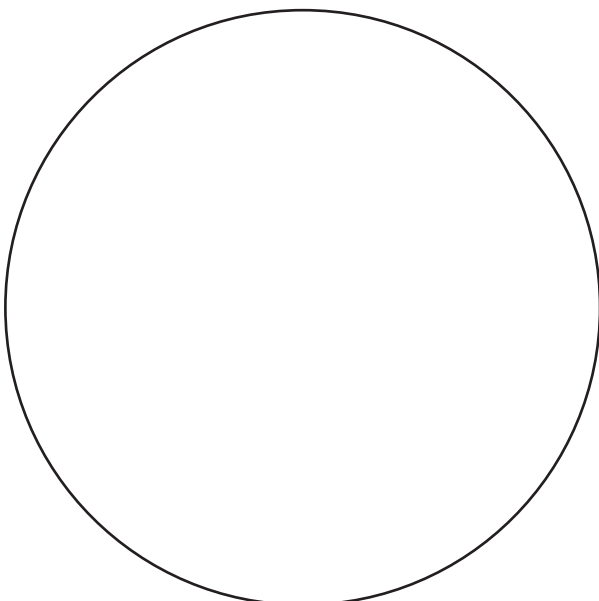
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Q3 Allocation Plan

Your allocation plan is your purchase plan for each trading quarter. Think about your goal, your risk tolerance, and the economic forecast, and record your investments on the table and graph below. All prices and quantities are estimates and do not include fees.

Financial Goal		BB
Current Portfolio Value	-	BB
Distance to Goal		BB

Investment Type	Quantity on Hand	Forecasted Quantity	Trade Plan (B or S)	Price	Total Value (forecasted quantity x price)
Stock					
Venture Capital					
Collectibles					
Real Estate					
Bonds					
CDs					
Subtotal					
Cash					
Portfolio Value					BB



Investment Type	Planned % of Portfolio
Stock	
Venture Capital	
Collectibles	
Real Estate	
Bonds	
CDs	
Cash	
Total	100%

Team Name: _____

Goal Tracking

47. What is the team's financial goal? _____ **BB**
48. What is the team's current portfolio value? (See line 45 on Finance Worksheet 2) _____ **BB** Distance to Goal
49. Total BizBucks needed to reach the team's financial goal =

Trading Record

50. How many BizBucks does the team have on hand for the start of the third trading session? Starting Cash
 (See line above) Count the team's BizBucks to confirm this value.

Investment Type	Bought (B) or Sold (S)	Quantity	Price per Investment	Subtotal (Quantity x Price)	Service Fee (+ / -)	Total (+ / -)	Balance (Cash on Hand)
2 trades minimum							

51. How many BizBucks does the team have on hand at the end of the third trading session? Ending Cash

Checked by MD _____

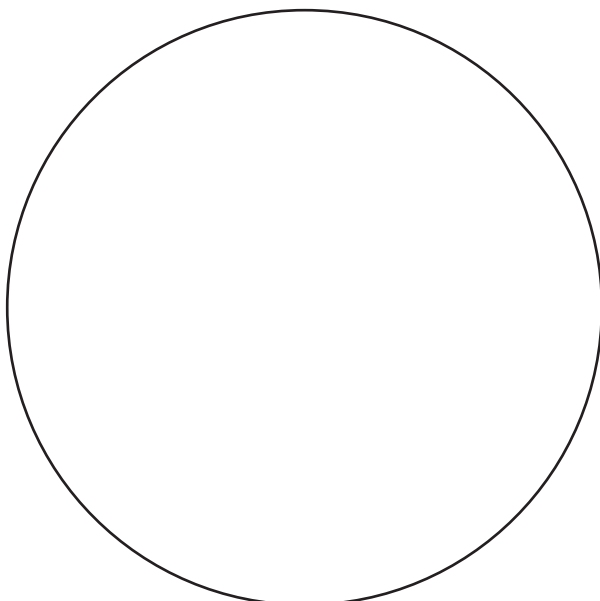
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Q4 Allocation Plan

Your allocation plan is your purchase plan for each trading quarter. Think about your goal, your risk tolerance, and the economic forecast, and record your investments on the table and graph below. All prices and quantities are estimates and do not include fees.

Financial Goal		BB
Current Portfolio Value	-	BB
Distance to Goal		BB

Investment Type	Quantity on Hand	Forecasted Quantity	Trade Plan (B or S)	Price	Total Value (forecasted quantity x price)
Stock					
Venture Capital					
Collectibles					
Real Estate					
Bonds					
CDs					
Subtotal					
Cash					
Portfolio Value					BB



Investment Type	Planned % of Portfolio
Stock	
Venture Capital	
Collectibles	
Real Estate	
Bonds	
CDs	
Cash	
Total	100%

Team Name: _____

Goal Tracking

70. What is the team's financial goal? _____ **BB**

71. What is the team's current portfolio value? (See line 68 on Finance Worksheet 3) _____ **BB**

72. Total BizBucks needed to reach the team's financial goal = **BB** Distance to Goal

Trading Record

73. How many BizBucks does the team have on hand for the start of the fourth trading session? **BB** Starting Cash

(See line above) Count the team's BizBucks to confirm this value.

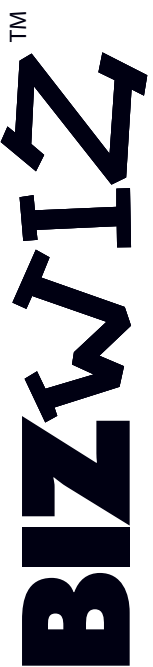
Investment Type	Bought (B) or Sold (S)	Quantity	Price per Investment	Subtotal (quantity x price)	Service Fee (+ / -)	Total (+ / -)	Balance (Cash on Hand)
2 trades minimum							

74. How many BizBucks does the team have on hand at the end of the fourth trading session? **BB** Ending Cash

Checked by MD _____

Team Name: _____

Investment Portfolio



line 6

Stock
Venture Capital
Collectible

line 4

Real Estate
Bond

line 5

Risky

(RED)

Safe

(YELLOW)

line 1

Instructions

1. Fold inward along line 1 and line 2
2. Fold inward along line 3
3. Fold inward along line 4
4. Tape along line 5 and line 6

line 4

line 3

line 2

(print team name)

MANAGING DIRECTOR

Responsible for overseeing and leading the team in achieving their investment goal.

MOTTO:

“Together we will reach our investment goal.”

(print team name)

CONTROLLER

Responsible for tracking investments and calculating finances.

MOTTO:

“Investing pays off”

(print team name)

ANALYST

Responsible for evaluating which investments are bought and sold.

MOTTO:

“The trend is your friend”

(print team name)

ANALYST

Responsible for evaluating which investments are bought and sold.

MOTTO:

“The trend is your friend”

(print team name)

TRADER

Responsible for buying and selling investments on behalf of the team.

MOTTO:

“Buy low, sell high”

(print team name)

TRADER

Responsible for buying and selling investments on behalf of the team.

MOTTO:

“Buy low, sell high”