



PRE-ASSESSMENT (Part I)

Name _____

Date _____

Teacher _____

Grade _____

School _____

City, State _____

Gender (Check One) Male Female

Matching: Please write the letter of the definition that best defines the following terms in the space provided.

_____ 1. Return

A. The shares of a company that represent ownership in the company

_____ 2. Interest

B. The money gained (or lost) on an investment

_____ 3. Bonds

C. A policy purchased by the investor in the case of loss or damage to an investment

_____ 4. Real Estate

D. Fixed charge for borrowing money

_____ 5. Collectable

E. Property in the form of land or buildings

_____ 6. Investment

F. A cash loan given to either a company or government for a specific period of time in return for a fixed amount of interest

_____ 7. Stock

G. An object with a value that is expected to increase over time

_____ 8. Insurance

H. Property or possession acquired for future financial return or benefit

PRE-ASSESSMENT (Part II)

Name _____ Date _____
 Teacher _____ Grade _____
 School _____ City, State _____

Gender (Check One) Male Female

Directions: Rate each statement below on a scale of 0 - 4. The same rating may be applied to more than one statement. If you have already participated in the BizWiz program, please consider this experience in your response.

	No Importance	(circle one)			Highest Importance
a. Studying mathematics in school	0	1	2	3	4
b. Working well on a team	0	1	2	3	4
c. Planning for my financial future	0	1	2	3	4
d. Studying money management and investing in school	0	1	2	3	4

	No Interest	(circle one)			Highest Interest
a. To improve my skills in mathematics	0	1	2	3	4
b. To improve my leadership skills and my ability to motivate others	0	1	2	3	4
c. To improve my understanding of money management and investing	0	1	2	3	4
d. To start investing one day	0	1	2	3	4

	Strongly Agree	(circle one)			Strongly Disagree
a. Mathematics is an important skill in planning ones financial future	0	1	2	3	4
b. Learning to work with others will help me be successful	0	1	2	3	4
c. Investing benefits me and the economy	0	1	2	3	4
d. Everyone should have the freedom to invest	0	1	2	3	4

Sum Total: / 48

Directions: Rank each of the following careers, 1 - 6, in the order you would most like to pursue (the number 1 will indicate the career you would **most** like to pursue). The same number may NOT be used more than once.

- | | |
|---|--|
| _____ Entrepreneur (business owner) | _____ Science (researcher, engineer) |
| _____ Medicine (doctor, nurse, veterinarian) | _____ Arts (actor, photographer, writer) |
| _____ Education (teacher, principal, professor) | _____ Law (attorney, judge) |
| _____ Computers (programmer, web developer) | _____ Finance (banker, stock broker) |



PRE-ASSESSMENT KEY (Part I)

Name _____

Date _____

Teacher _____

Grade _____

School _____

City, State _____

Gender (Check One) Male Female

Matching: Please write the letter of the definition that best defines the following terms in the space provided.

__B__ 1. Return

A. The shares of a company that represent ownership in the company

__D__ 2. Interest

B. The money gained (or lost) on an investment

__F__ 3. Bonds

C. A policy purchased by the investor in the case of loss or damage to an investment

__E__ 4. Real Estate

D. Fixed charge for borrowing money

__G__ 5. Collectible

E. Property in the form of land or buildings

__H__ 6. Investment

F. A cash loan given to either a company or government for a specific period of time in return for a fixed amount of interest

__A__ 7. Stock

G. An object with a value that is expected to increase over time

__C__ 8. Insurance

H. Property or possession acquired for future financial return or benefit

