



Version 1.0

Team Name: _____

TEAM PACKET

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(PRINT TEAM NAME)

Analyst

Responsible for evaluating and recording which investments are bought and sold.

Motto: "The trend is your friend"

(PRINT TEAM NAME)

Analyst

Responsible for evaluating and recording 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 investment team.

Motto: "Buy low, sell high"

(PRINT TEAM NAME)

Trader

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

Motto: "Buy low, sell high"

(PRINT TEAM NAME)

Controller

Responsible for tracking investments and calculating finances.

Motto: "Investing pays off"

(PRINT TEAM NAME)

Controller

Responsible for tracking investments and calculating finances.

Motto: "Investing pays off"

INVESTMENT TYPES AND INSURANCE



Stocks are shares in a company. Owning stock means that you own a part of the company. The price of each share is determined by what someone is willing to pay for it.



Venture capital is money invested in new companies in return for partial ownership of the business. Venture capital is invested over a long period of time in hopes of a big return.



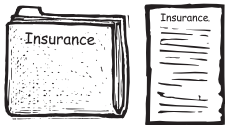
Collectibles are objects with a value that is expected to increase over time. For example, paintings, classic cars or rare baseball cards



A bond is a loan to a company or government. In return, they pay you a fixed amount of interest over a certain period of time.



Real estate is property that is either commercial (office buildings, residential (houses or apartments) or industrial (factories or warehouses).



Insurance protects your investment. Real estate insurance protects your property against loss of title and natural disasters such as fire. Collectible insurance protects against theft, loss and/or maintenance.

Team Name: _____

Investment Portfolio

(T3)



line 5

line 4

line 6

Risky

(RED)

Stock

Venture Capital

Collectible

Safe

(YELLOW)

Real Estate

Bond

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



TRADING RULES

1. Each trading session will last between five and ten minutes.
2. Analysts and controllers must remain seated during the trading session, only traders may move around the room to buy and sell investments.
3. Each team must make a minimum of TWO trades per session. A **trade** is defined as the purchase or sale of an investment.
4. Each team must make at least ONE trade with another team.
5. Prices are determined by the last posted value on the BizWiz Big Board.
6. A service fee of \$1 BB per investment type will be charged for trades made with the investment firm.
7. Service fees are not charged for the purchase of insurance.
8. Failure to comply with the above trading rules will result in a fine of \$5 BB per violation.

Team Name: _____

Goal Tracking

1. What is the team's financial goal? _____
2. What is the team's initial value? _____
3. Total BizBucks needed to reach the team's financial goal =

Trading Record

4. How many BizBucks does the team have on hand for the start of the first trading session? _____ Starting Balance (cash on hand)
- (See line 2) Count the team's BizBucks to confirm this value.


Investment Type	Quantity	Price per Investment		Service Fee (-)	Transaction Total	Balance (line 4 +/- transaction total)
		Cash In (+)	Cash Out (-)			
		N/A				
		N/A				
		N/A				
		N/A				
		N/A				
		N/A				
		N/A				
		N/A				
		N/A				


5. How many BizBucks does the team have on hand at the end of the first trading session? _____ Ending Balance (cash on hand)
- Count the team's BizBucks to confirm this value.

Team Name: _____ Date: _____

Portfolio Analysis		closing price (\$)	quantity	value (\$)
6. What is the value of the stock investment in the team's portfolio?	_____	×	_____	= _____
7. What is the value of the venture capital investment in the team's portfolio?	_____	×	_____	= _____
8. What is the value of the collectible investment in the team's portfolio?	_____	×	_____	= _____
9. What is the value of the real estate investment in the team's portfolio?	_____	×	_____	= _____
10. What is the value of the bond investment in the team's portfolio?	_____	×	_____	= _____
11. Total value of the team's portfolio sum of the values (line 6 + line 7 + line 8 + line 9 + line 10)			= <input type="text"/>

STOP! Teams must now decide if they wish to purchase insurance. Wild cards must be drawn before proceeding.

Cash In 			
12. How many BizBucks did the team have on hand at the end of the first trading session? (See line 5)	_____		
13. Did the team receive additional BizBucks from the wild cards? How many?	_____	+	_____
14. (Level III only) Did the team receive additional BizBucks from the payout? How many?	_____	+	_____
15. Other cash in (Description: _____)	_____	+	_____
16. Total cash in		= <input type="text"/>

Cash Out 			
17. How many BizBucks did the team spend on real estate insurance?	_____		
18. How many BizBucks did the team spend on collectible insurance?	_____	+	_____
19. Did the team lose additional BizBucks from the wild cards? How many?	_____	+	_____
20. (Level III only) Did the team lose additional BizBucks from the payout? How many?	_____	+	_____
21. Other cash out (Description: _____)	_____	+	_____
22. Total cash out		= <input type="text"/>

Current Value = Portfolio Value + Total Cash In - Total Cash Out		Current Value:
23. What is the team's current value?	(line 11 + line 16 - line 22)	= <input type="text"/>

Cash On Hand  = Total Cash In - Total Cash Out		Cash On Hand:
24. How many BizBucks does the team currently have on hand?	(line 16 - line 22)	= <input type="text"/>

Team Name: _____ Date: _____

Portfolio Analysis

	closing price (\$)	quantity	value (\$)
30. What is the value of the stock investment in the team's portfolio?	_____	×	_____ = _____
31. What is the value of the venture capital investment in the team's portfolio?	_____	×	_____ = _____
32. What is the value of the collectible investment in the team's portfolio?	_____	×	_____ = _____
33. What is the value of the real estate investment in the team's portfolio?	_____	×	_____ = _____
34. What is the value of the bond investment in the team's portfolio?	_____	×	_____ = _____
35. Total value of the team's portfolio	sum of the values (line 30+ line 31 + line 32 + line 33 + line 34)		_____ = <input type="text"/>

STOP! Teams must now decide if they wish to purchase insurance. Wild cards must be drawn before proceeding.

Cash In



36. How many BizBucks did the team have on hand at the end of the second trading session? (See line 29)	_____		
37. Did the team receive additional BizBucks from the wild cards? How many?	_____	+	
38. (Level III only) Did the team receive additional BizBucks from the payout? How many?	_____	+	
39. Other cash in (Description: _____)	_____	+	
40. Total cash in			_____ = <input type="text"/>

Cash Out



41. How many BizBucks did the team spend on real estate insurance?	_____		
42. How many BizBucks did the team spend on collectible insurance?	_____	+	
43. Did the team lose additional BizBucks from the wild cards? How many?	_____	+	
44. (Level III only) Did the team lose additional BizBucks from the payout? How many?	_____	+	
45. Other cash out (Description: _____)	_____	+	
46. Total cash out			_____ = <input type="text"/>

Current Value = Portfolio Value + Total Cash In - Total Cash Out

47. What is the team's current value? (line 35 + line 40 - line 46)	_____	=	<input type="text"/>
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Cash On Hand = Total Cash In - Total Cash Out



48. How many BizBucks does the team currently have on hand? (line 40 - line 46)	_____	=	<input type="text"/>
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Team Name: _____ Date: _____

Portfolio Analysis

	closing price (\$)	quantity	value (\$)
54. What is the value of the stock investment in the team's portfolio?	_____	×	_____ = _____
55. What is the value of the venture capital investment in the team's portfolio?	_____	×	_____ = _____
56. What is the value of the collectible investment in the team's portfolio?	_____	×	_____ = _____
57. What is the value of the real estate investment in the team's portfolio?	_____	×	_____ = _____
58. What is the value of the bond investment in the team's portfolio?	_____	×	_____ = _____
59. Total value of the team's portfolio sum of the values (line 54+ line 55 + line 56 + line 57 + line 58)		= <input type="text"/>

STOP! Teams must now decide if they wish to purchase insurance. Wild cards must be drawn before proceeding.

Cash In



60. How many BizBucks did the team have on hand at the end of the third trading session? (See line 53)	_____		
61. Did the team receive additional BizBucks from the wild cards? How many?	+	_____	
62. (Level III only) Did the team receive additional BizBucks from the payout? How many?	+	_____	
63. Other cash in (Description: _____)	+	_____	
64. Total cash in		= <input type="text"/>

Cash Out



65. How many BizBucks did the team spend on real estate insurance?	_____		
66. How many BizBucks did the team spend on collectible insurance?	+	_____	
67. Did the team lose additional BizBucks from the wild cards? How many?	+	_____	
68. (Level III only) Did the team lose additional BizBucks from the payout? How many?	+	_____	
69. Other cash out (Description: _____)	+	_____	
70. Total cash out		= <input type="text"/>

Current Value = Portfolio Value + Total Cash In - Total Cash Out

71. What is the team's current value? (line 59 + line 64 - line 70)	=	<input type="text"/>
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Cash On Hand



= Total Cash In - Total Cash Out

72. How many BizBucks does the team currently have on hand? (line 64 - line 70)	=	<input type="text"/>
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Team Name: _____ Date: _____

Portfolio Analysis

	closing price (\$)	quantity	value (\$)
78. What is the value of the stock investment in the team's portfolio?	_____	×	_____ = _____
79. What is the value of the venture capital investment in the team's portfolio?	_____	×	_____ = _____
80. What is the value of the collectible investment in the team's portfolio?	_____	×	_____ = _____
81. What is the value of the real estate investment in the team's portfolio?	_____	×	_____ = _____
82. What is the value of the bond investment in the team's portfolio?	_____	×	_____ = _____
83. Total value of the team's portfolio sum of the values (line 78 + line 79 + line 80 + line 81 + line 82)		= <input type="text"/>

STOP! Teams must now decide if they wish to purchase insurance. Wild cards must be drawn before proceeding.

Cash In



84. How many BizBucks did the team have on hand at the end of the fourth trading session? (See line 77)	_____		
85. Did the team receive additional BizBucks from the wild cards? How many?	+	_____	
86. (Level III only) Did the team receive additional BizBucks from the payout? How many?	+	_____	
87. Other cash in (Description: _____)	+	_____	Total Cash In:
88. Total cash in		= <input type="text"/>

Cash Out



89. How many BizBucks did the team spend on real estate insurance?	_____		
90. How many BizBucks did the team spend on collectible insurance?	+	_____	
91. Did the team lose additional BizBucks from the wild cards? How many?	+	_____	
92. (Level III only) Did the team lose additional BizBucks from the payout? How many?	+	_____	
93. Other cash out (Description: _____)	+	_____	Total Cash Out:
94. Total cash out		= <input type="text"/>

Current Value = Portfolio Value + Total Cash In - Total Cash Out

95. What is the team's current value? (line 83 + line 88 - line 94) = Current Value:

Return  = Current Value - Initial Value

96. What is the team's return? (line 95 - line 2) = ROI: