Fidelity INVESTMENTS

Learn to Invest with Fidelity®

At-home conversation starter

Overview

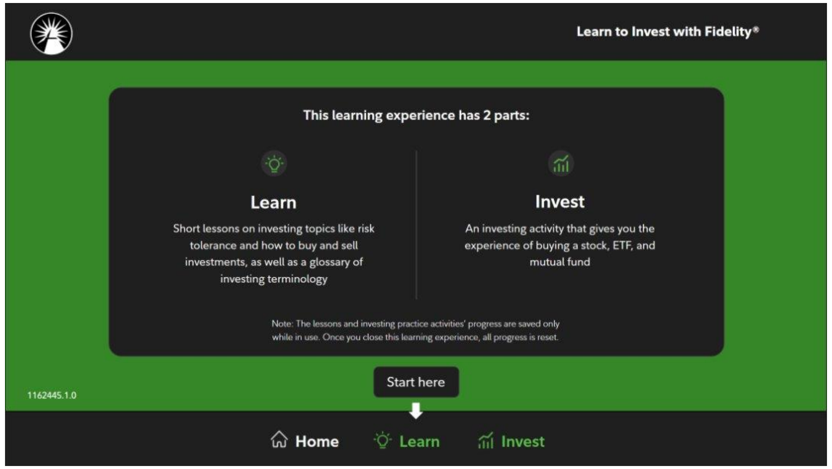
[Learn to Invest with Fidelity](#)® gives learners an opportunity to explore the world of investing in a risk-free environment. Through mini-lessons, knowledge checks, and an investing practice activity, learners are empowered to build confidence in embarking on their investing journey.

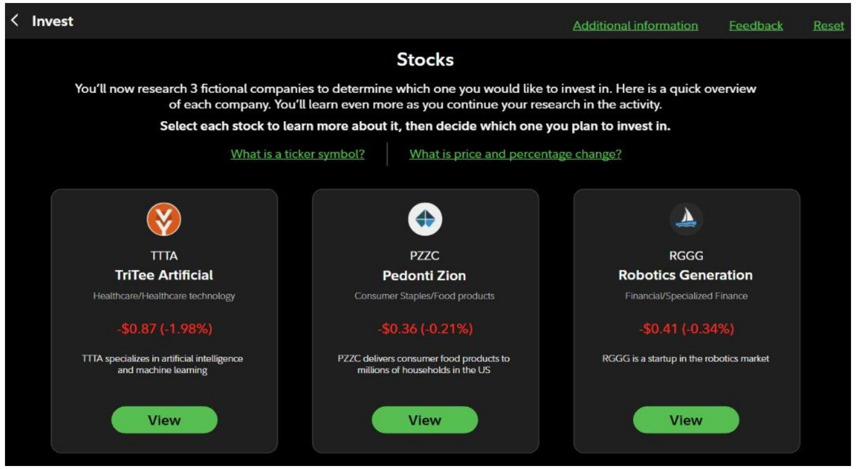
Key takeaways

The learning experience has three learning objectives that can help learners understand what entails investing:

Learning objectives: *Learners will be able to...*

- Describe the basics of investing – what it is and how it works.
- Examine market risks and risk tolerance in navigating volatility.
- Practice researching investments, analyzing information, placing a trade, and monitoring investment decisions.





** Notes: The learning experience does not save learners' choices and progress. While families and educators won't be able to review how learners have built their portfolios in the simulation, learners can go through the experience as many times as they want and explore different options.*

Before the conversation

As important as it is, talking about money with your learners may not always feel easy. Here is some guidance that can help you prepare for and facilitate conversations.

1. **Lead by example:**
   Make sure you're being a good money role model – including your habits, behaviors, and even mistakes. Be responsible, take accountability, and have open conversations about money, so you can set your learners up for success.

2. **Integrate "money talks" into everyday life:**
   Anything that involves money and the exchange of value can be a learning opportunity. It may be helpful to share real-life examples with your learners. Examples can include purchase decisions, spending choices, saving and investing scenarios, etc. Money conversations can happen in the moment.

3. **Be curious and keep it interesting:**
   Many new investors are ready to start making money moves - ranging from earning to investing. Ask your learners questions to learn more about how they handle money. Use their life experiences (e.g., part-time job, wants/needs, goals, etc.) as a learning tool to keep the conversation interesting and engaging.

Conversation starters for families

The Learn to Invest with Fidelity educational experience has taught learners the basics of investing. Now it's time to connect lessons learned to their everyday lives.

Ask Each Other

Q1: What's investing? How is it different from saving?

Q2: What are some things you want to save for, either now or in the future? Could investing help you achieve those goals?

For Families: Share Your Stories

Q3: What are some BIG purchases or things you have spent money on?

- At what age did you make these purchases?
- How much did the purchases cost?
- How did you save up the money?

Q4: What are your goals with saving and investing your money?

- Have they changed over time? If so, how?
- Do you think they will change over time? If so, how?
- How do you prioritize savings and investing?

Notes

Next steps

Continue teaching learners about money with fun, digestible resources.

Visit Learn on Fidelity.com today and help set your learners up for success with their money moves, including spending, saving, and investing.

Important Information

Investing involves risk, including risk of loss.

Learn to Invest with Fidelity is intended to be an educational experience and is not a recommendation to buy or sell any investment or security. As with all your investments at Fidelity, you must make your own determination whether an investment in any particular security or securities is consistent with your investment objectives, risk tolerance, financial situation, and evaluation of the security.

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