Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Personal Finance—*Semester One*

P o r t f o l i o S c o r e G u i d e **Portfolio Total** \_\_\_\_\_\_\_\_\_ **/ 108pts**

**Cover Page—5pts**

* Cover page depicts time, effort, professionalism and/or creativity; printed in color to attract the eye;

placed in binder cover window or in a page protector inside binder

* Cover is digitally created and printed (no hand drawn text or images)
* Student’s name, the course name and class period are on the cover **Total** \_\_\_\_\_\_\_\_\_\_\_ **5pts**

**Portfolio Contents—5pts**

* Portfolio is contained within a standard 3-ring binder (no Velcro or zipper binders)
* Documents are within the binder’s rings, no documents in binder or divider pockets;

documents with torn holes are mended & repunched

* Sections are separated from each other using a sturdy *tabbed* divider and in the correct order
* Documents are in correct sections
* Table of contents is present **Total** \_\_\_\_\_\_\_\_\_\_\_ **5pts**

**Section One: Notes—10pts**

* ALL note blanks are completed
* Notes are in order by page number; any handwritten note pages should be at the back of this

section, *behind* all the typed pages (“handwritten notes” do not include warm-ups) **Total** \_\_\_\_\_\_\_\_\_\_\_ **10pts**

**Section Two: Warm-Ups and Vocabulary—10pts**

* Warm-ups (including checks, deposit slips & register) and vocabulary are present in section
* Any extra notebook paper is located *at the back* of this section **Total** \_\_\_\_\_\_\_\_\_\_\_ **10pts**

**Section Three: Coursework—2pts each**  (*Points are lost for missing items or items placed out of order from the list below)*

1. \_\_\_\_\_\_\_\_\_\_\_ ~~SPENT~~ Worksheet—Practice Round
2. \_\_\_\_\_\_\_\_\_\_\_ 2-1—Interpret Scatterplots Worksheet
3. \_\_\_\_\_\_\_\_\_\_\_ 2-2—Linear Regression Worksheet
4. \_\_\_\_\_\_\_\_\_\_\_ 2-4—Fixed and Variable Expenses Worksheet
5. \_\_\_\_\_\_\_\_\_\_\_ 2-5—Graphs of Expense and Revenue Functions Worksheet
6. \_\_\_\_\_\_\_\_\_\_\_ ~~SPENT~~ Worksheet—Round 1
7. \_\_\_\_\_\_\_\_\_\_\_ Exam: Basics of Business
8. \_\_\_\_\_\_\_\_\_\_\_ Market Simulation Score Sheet (Buyer vs. Seller)
9. \_\_\_\_\_\_\_\_\_\_\_ Quiz: Stock Market Vocabulary
10. \_\_\_\_\_\_\_\_\_\_\_ 1-2—Stock Market Data Worksheet
11. \_\_\_\_\_\_\_\_\_\_\_ 1-3—Stock Market Data Charts Worksheet
12. \_\_\_\_\_\_\_\_\_\_\_ 1-5—Stock Market Ticker Worksheet
13. \_\_\_\_\_\_\_\_\_\_\_ 1-4—Simple Moving Averages Worksheet
14. \_\_\_\_\_\_\_\_\_\_\_ 1-8/1-9—Stock Splits and Dividend Income Worksheet
15. \_\_\_\_\_\_\_\_\_\_\_ Exam: The Stock Market
16. \_\_\_\_\_\_\_\_\_\_\_ Careers Cluster Interest Survey and Job Opening Printout
17. \_\_\_\_\_\_\_\_\_\_\_ Qualities and Skills Resume Inventory (on notebook paper)
18. \_\_\_\_\_\_\_\_\_\_\_ First Drafts of Cover Letter, Resume, References Page and Application
19. \_\_\_\_\_\_\_\_\_\_\_ Second Drafts of Cover Letter, Resume, References Page and Application
20. \_\_\_\_\_\_\_\_\_\_\_ Employment Basics Calculations Worksheet

~~SPENT~~ Worksheet—Round 2 (not assigned as not all students were able to complete)

1. \_\_\_\_\_\_\_\_\_\_\_ 6-2—Pay Periods and Hourly Rates Worksheet (used for review and not scored)
2. \_\_\_\_\_\_\_\_\_\_\_ 6-5—Social Security and Medicare Worksheet (used for review and not scored)
3. \_\_\_\_\_\_\_\_\_\_\_ Exam: Employment Basics
4. \_\_\_\_\_\_\_\_\_\_\_ Banking Services Pre-Test
5. \_\_\_\_\_\_\_\_\_\_\_ 3-1—Checking Accounts Worksheet
6. \_\_\_\_\_\_\_\_\_\_\_ 3-2—Reconcile a Banks Statement Worksheet
7. \_\_\_\_\_\_\_\_\_\_\_ 3-3—Savings Accounts Worksheet (unstaple from 3-4 and 3-6)
8. \_\_\_\_\_\_\_\_\_\_\_ 3-4—Explore Compound Interest Worksheet
9. \_\_\_\_\_\_\_\_\_\_\_ 3-6—Continuous Compounding Worksheet
10. \_\_\_\_\_\_\_\_\_\_\_ Exam: Banking Services
11. \_\_\_\_\_\_\_\_\_\_\_ 2017 Form 1040 (practice)
12. \_\_\_\_\_\_\_\_\_\_\_ 2018 Form 1040 (practice)
13. \_\_\_\_\_\_\_\_\_\_\_ Exam: Income Tax **Total** \_\_\_\_\_\_\_\_\_\_\_\_\_ **66pts**

**Section Four: Semester Projects (due January 23rd)**

1. \_\_\_\_\_\_\_\_\_\_\_ Cover Letter (final copy)—10pts

**Employer Information: Job Position:** Senior Waterfront & Ports Engineer

*Sara Williamson, PE*

*Executive Manager of Projects*

Tetra Tech [www.tetratech.com](http://www.tetratech.com)

400 112th Ave NE #400

Bellevue WA 98004

1. \_\_\_\_\_\_\_\_\_\_\_ Resume (final copy)—10pts
2. \_\_\_\_\_\_\_\_\_\_\_ References Page (final copy)—5pts
3. \_\_\_\_\_\_\_\_\_\_\_ Job Application (final copy)—10pts
4. \_\_\_\_\_\_\_\_\_\_\_ “Find the Financial Institution for You” Project—20pts

**Includes:**

* Completed project worksheet
* Picture(s) of you and the employee you interviewed at your chosen financial institution
* Signed/dated business card of employee interviewed
* Thank you card for employee interviewed completed and submitted to Mrs. Reed

1. *\_\_\_\_\_\_\_\_\_\_\_*  2018 Form W-2 and Form 1040 (final copy)—15pts

**Filing Details:**

* Filing Status: Married filing separately
* SSN: See W-2
* Home Address: See W-2
* Health Care Coverage: You and your dependent were fully covered for 2018
* DO NOT check the Presidential Election Campaign box
* Dependents: One 6 year old daughter (you make up her name); SSN 111-22-3333; does not qualify for child tax credit (NOTE: Outside of one dependent, you are not eligible for any other exemptions/credits)
* Occupat­­­­­ion: Teacher
* Income: See W-2 (NOTE: You have no adjustments to income and/or no additional sources of income outside of your salary)
* Select Standard Deduction
* If you overpaid, you will opt to receive a check in the mail without contributing any of your refund to your 2019 taxes
* If you owe taxes, you will write a personal check in the amount owed

**Total** \_\_\_\_\_\_\_\_\_\_\_\_\_\_ **70pts**

**Section Five: Resources—2pts each**  \**Points are lost for missing items or items placed out of order from the list below.*

1. \_\_\_\_\_\_\_\_\_\_\_ Resume Examples Handout
2. \_\_\_\_\_\_\_\_\_\_\_ List of Action Verbs for Resumes & Professional Profiles Handout
3. \_\_\_\_\_\_\_\_\_\_\_ Reference Sheet Outline and Cover Letter Examples Handout
4. \_\_\_\_\_\_\_\_\_\_\_ Form W-4
5. \_\_\_\_\_\_\_\_\_\_\_ “Where to Stash Your Cash” Handout
6. \_\_\_\_\_\_\_\_\_\_\_ “The BIG Short” Cheat Sheet **Total** \_\_\_\_\_\_\_\_\_\_\_\_\_\_ **12pts**

**Section Six: Miscellaneous**

Universal Passes, “Spartans Gone Green” Log and “Things to Remember…” slip; Gone Green Logs will be collected in class