

INTUIT



Meet the presenters!

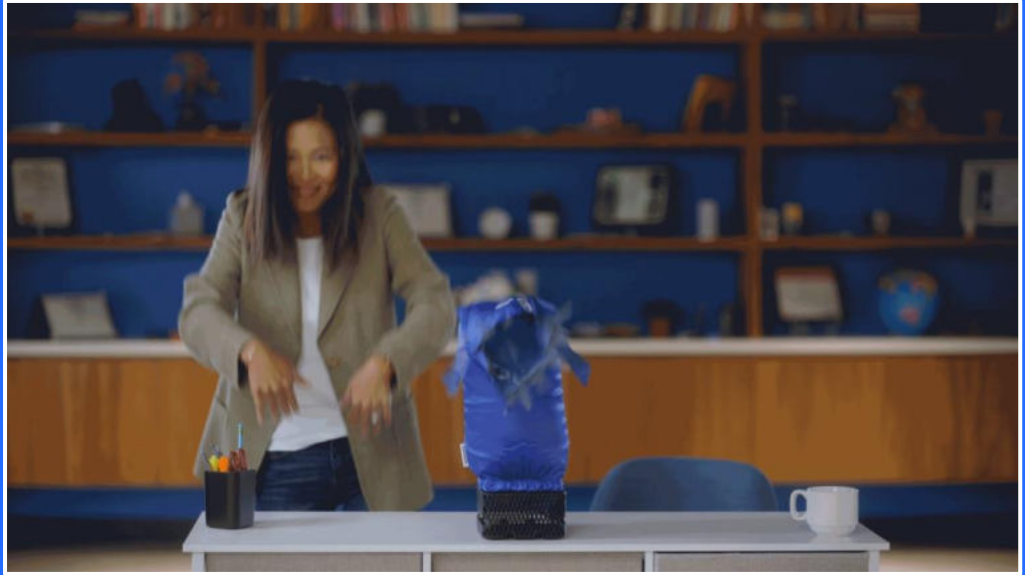


Teymour Ashkan



Emily Watkins-Daigle

Ok, but are
you
actually
ready?



Goals of this Intuit for Education session

- **Learn** about Intuit for Education's new and free financial literacy platform for educators to use in the classroom
- **Play** Intuit's personal finance Web3D Prosperity Quest game
- **Introduce** yourself to Intuit for Education Educator Community

Sign up to be one of the first educators to get an early access to Intuit for Education's financial literacy learning platform!



Why Intuit for Education?

- Real-world tools
- Flexible
- Differentiated
- Interactive
- Resources
- And all free!

The screenshot displays the Intuit for Education dashboard for a user named Ms. Roberts on Wednesday, October 4, 2023. The dashboard includes a sidebar with navigation options: Dashboard, Classes, Courses, Educator Community, and Professional Development. The main content area features a 'Good morning Ms. Roberts' greeting and a summary of student performance. A donut chart shows that 2 students are tracked, with 1 student past due, 1 student completed, and 0 students in progress or not started. A video player shows a welcome message from an educator. Below this is a table of classes with columns for class name, student count, chapters assigned, completion percentage, and a 'View class' link.

My classes	Students	Chapters assigned	Completion	
2nd period - Finance	0	0	0%	View class ...
1st Period - Personal Finance	1	1	100%	View class ...

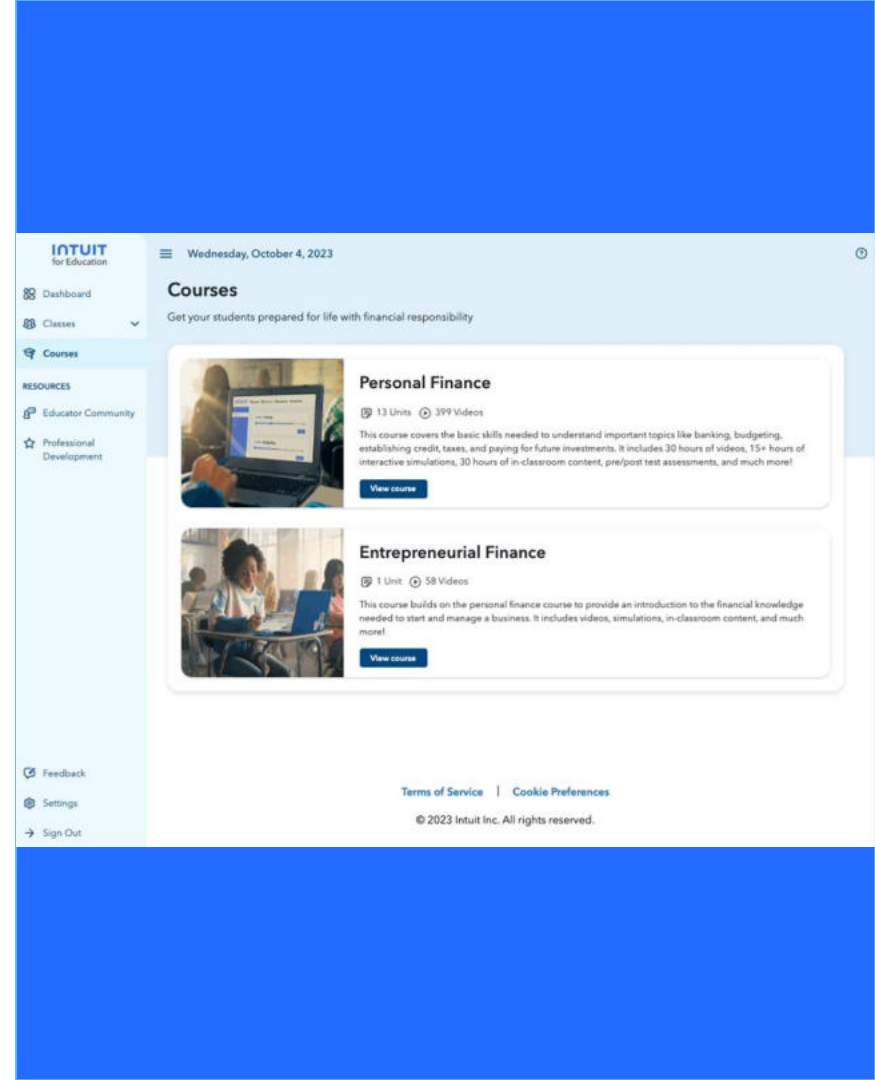
Change the Way You Teach Financial Literacy

Personal Finance Course

Provide students with the information they need to become financially literate as they move into adulthood.

Entrepreneurial Finance Course

Help students develop the foundational financial knowledge they need to succeed in managing the finances of a small business.



Create an Account

1. Enter **your email**, choose a password, then click **Create account**.
2. Click **Get Started**.
3. Enter **name information** and click **Next**.
4. Enter your **school zip code** and **name**, then click **Next**.
5. Click **Submit** OR **Remind me later**.

INTUIT for Education

Create an Intuit Account

One account connected to everything Intuit.

Already have an account? [Sign In](#)

Email

Password

Confirm password

Remember me




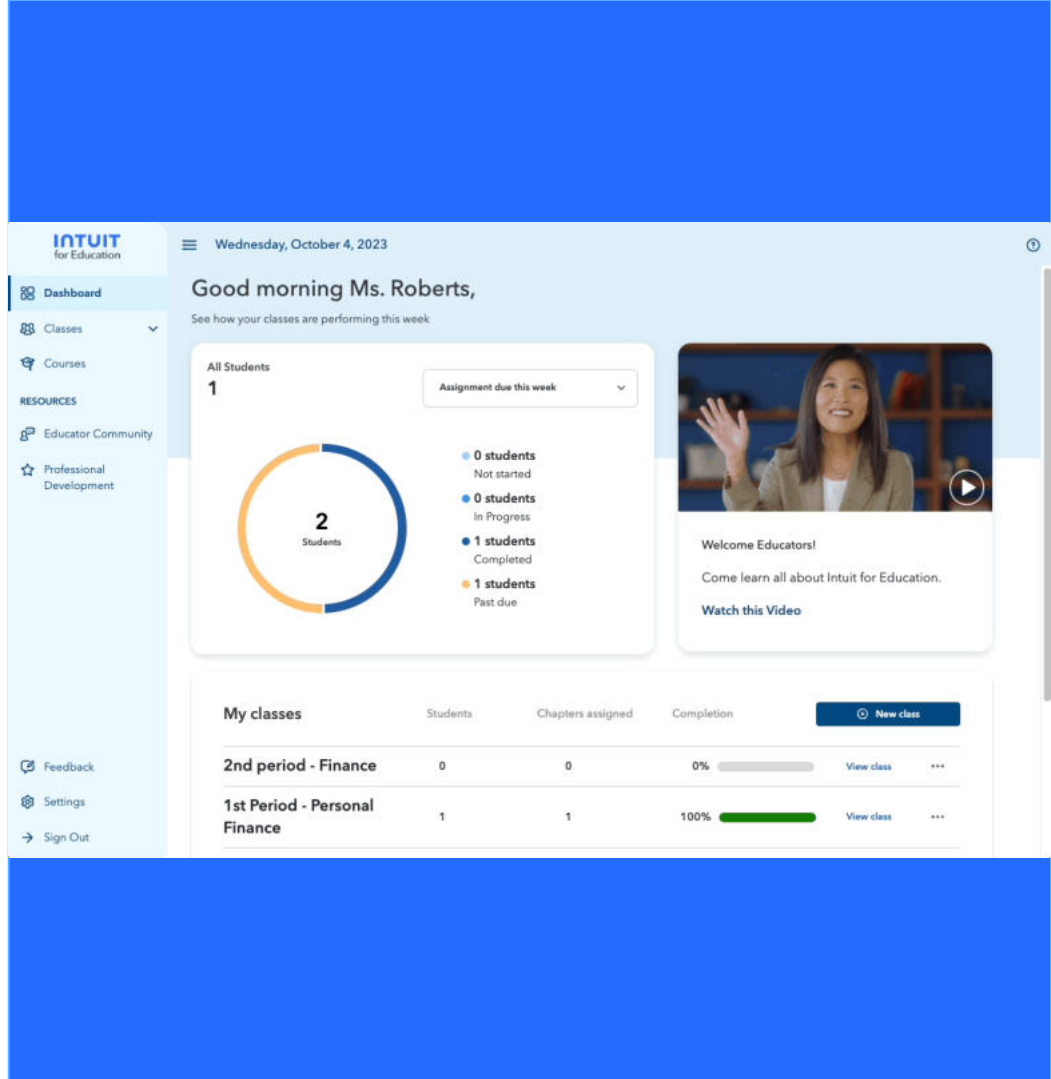
Create account

By selecting Create account, you agree to our [Terms](#) and acknowledge our [Privacy Statement](#).

Invisible reCAPTCHA by Google [Privacy Policy](#) and [Terms of Use](#).

Create a Class


1. Click  **New class**
2. Enter the **class information**, then click **Next**.
3. Click **Done**.
4. Once you create a Class, it will be added to the **Classes menu on the left sidebar**.

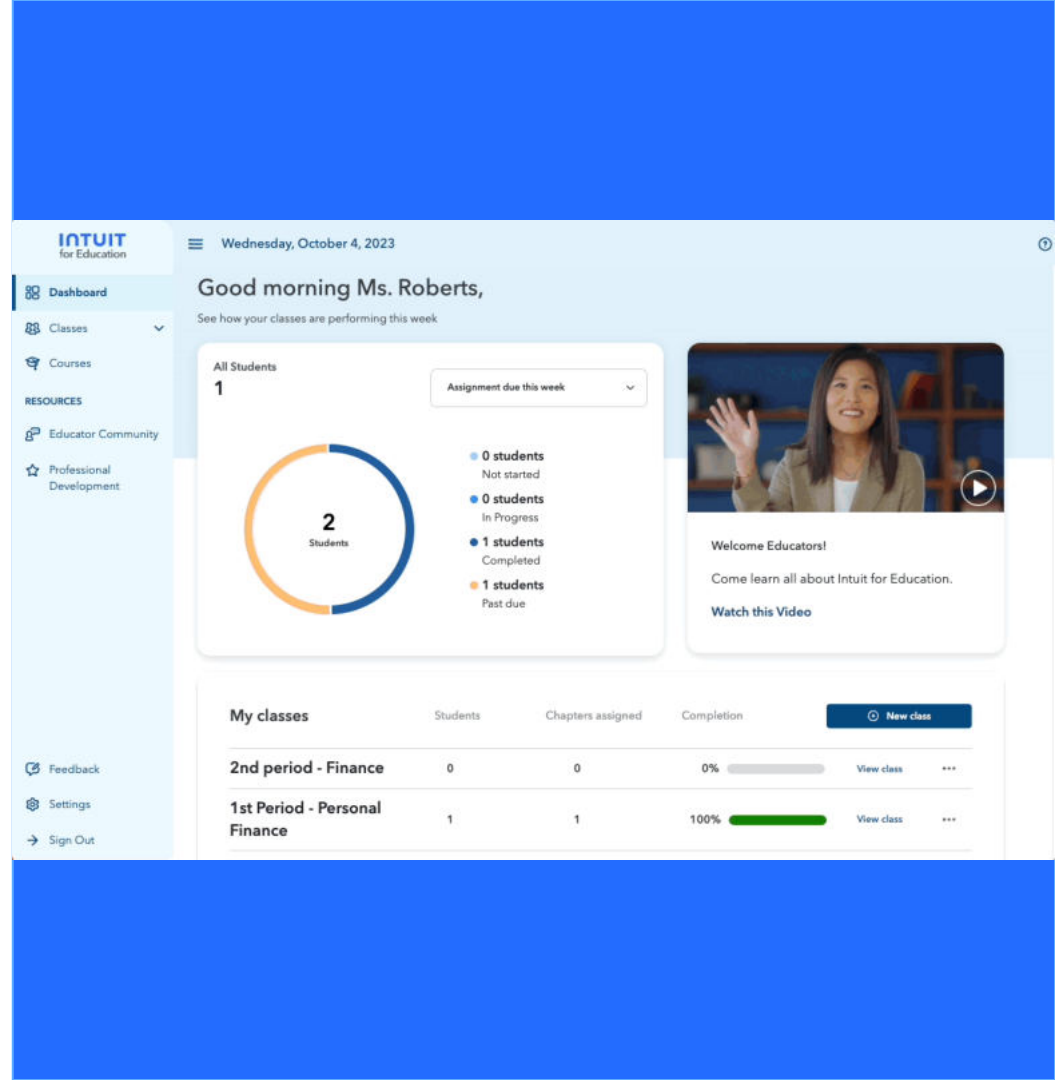


The screenshot displays the Intuit for Education dashboard. The top navigation bar includes the Intuit logo, the date "Wednesday, October 4, 2023", and a user profile icon. The left sidebar contains navigation options: Dashboard, Classes, Courses, Educator Community, Professional Development, Feedback, Settings, and Sign Out. The main content area features a personalized greeting "Good morning Ms. Roberts," and a performance overview for "All Students" (1 total). A donut chart shows 2 students, with a legend indicating: 0 students Not started, 0 students In Progress, 1 student Completed, and 1 student Past due. A "Watch this Video" section includes a video player and the text "Welcome Educators! Come learn all about Intuit for Education." Below this is a "My classes" table with columns for Students, Chapters assigned, and Completion. A "New class" button is located in the top right of the table area.



My classes	Students	Chapters assigned	Completion	
2nd period - Finance	0	0	0% <div style="width: 0%;"></div>	View class ...
1st Period - Personal Finance	1	1	100% <div style="width: 100%;"></div>	View class ...

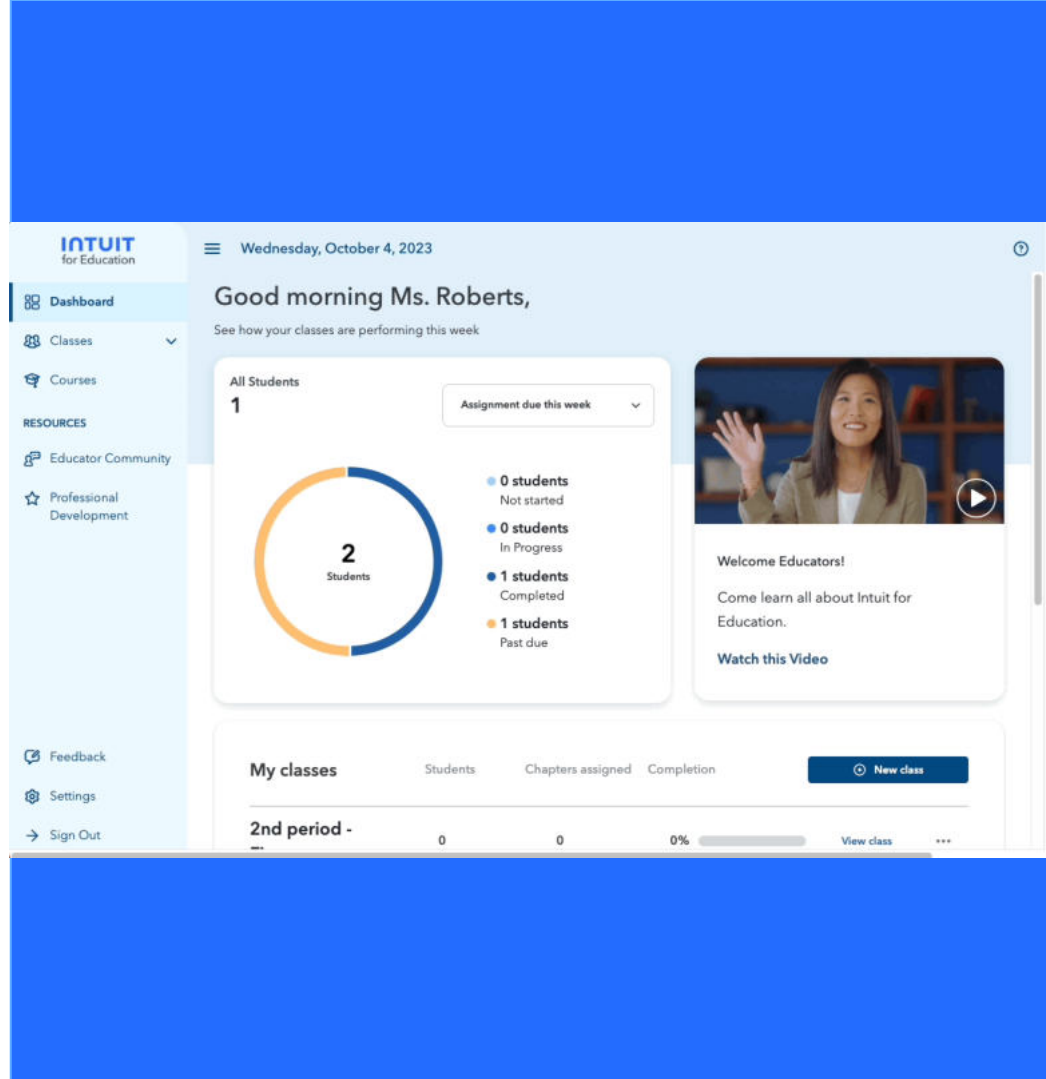
Student View

1. Click **Courses** on the left.
2. Select a course.
3. Click  **View chapter**
4. Navigate through the chapter elements to preview what students will see when they are logged in.



Invite Students

1. Open a **Class**.
2. Click  **Manage** 
3. Click **Invite**.
4. Click **Copy**.
5. Click **Done**.
6. Paste the invite link into an email or share via your LMS.



The screenshot displays the Intuit for Education dashboard for Ms. Roberts on Wednesday, October 4, 2023. The dashboard includes a navigation sidebar with options like Dashboard, Classes, Courses, and Resources. The main content area features a 'Good morning Ms. Roberts' greeting, a 'See how your classes are performing this week' section with a donut chart showing 2 students, and a 'My classes' table with columns for Students, Chapters assigned, and Completion. A video player is also visible on the right side of the dashboard.

My classes	Students	Chapters assigned	Completion	
2nd period -	0	0	0%	View class New class


Assign Content

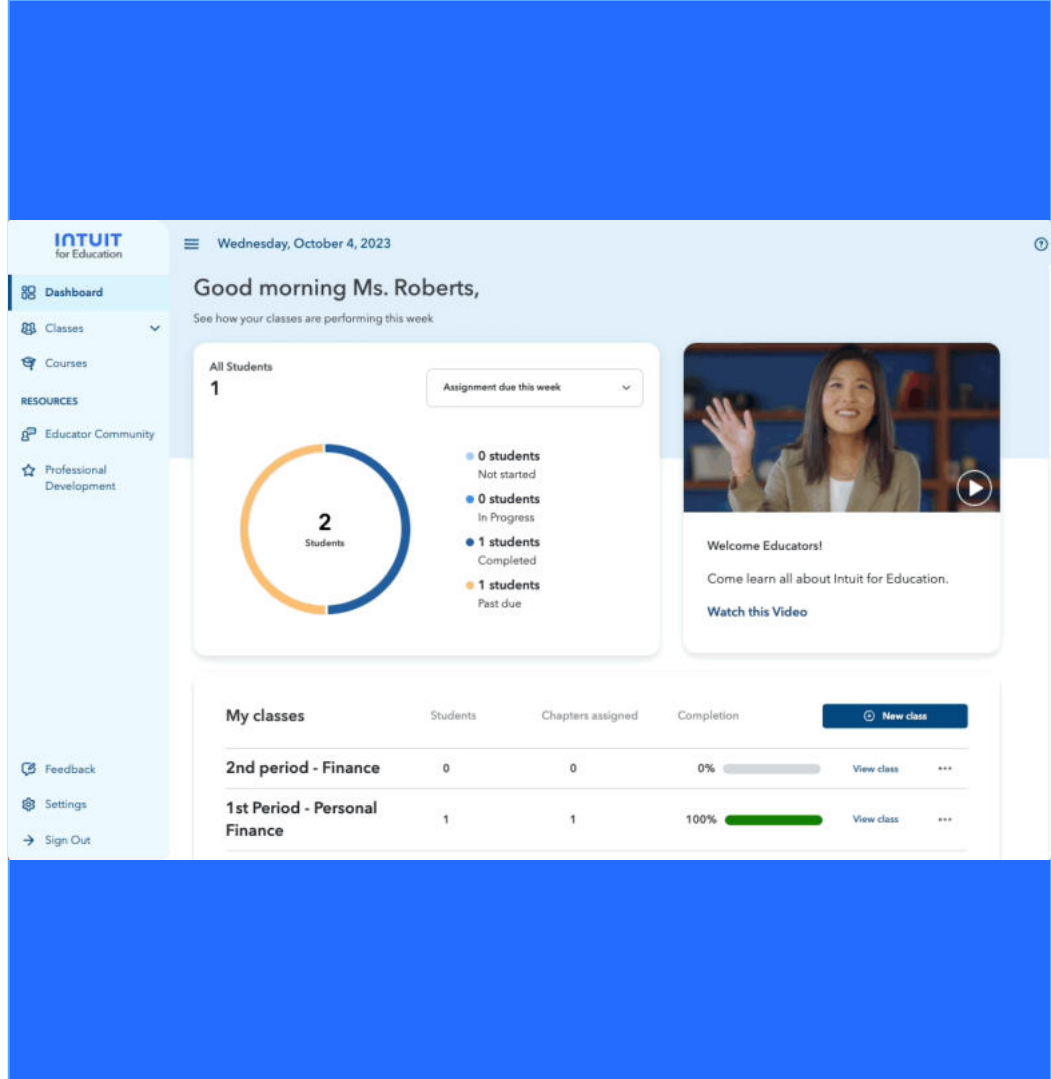
1. Click **Courses** on the left, then select a course.
2. Click the checkbox(es) for the chapter(s) you want to assign.
3. Click **Assign to my class**.
4. Select the class, start and end date for each chapter assigned.
5. Click **Next**, then **Confirm**.
6. Click **Done**.

The screenshot displays the Intuit for Education dashboard for Wednesday, October 4, 2023. The left sidebar contains navigation options: Dashboard, Classes (with a dropdown arrow), Courses, and RESOURCES (Educator Community, Professional Development, Feedback, Settings, Sign Out). The main content area features a greeting: "Good morning Ms. Roberts, See how your classes are performing this week". A central widget shows "All Students 1" with a donut chart indicating "2 Students" (1 orange, 1 blue). A legend lists: 0 students Not started, 0 students In Progress, 1 student Completed, and 1 student Past due. A "Watch this Video" section includes a video player and the text "Welcome Educators! Come learn all about Intuit for Education." Below is a "My classes" table with columns for Students, Chapters assigned, and Completion. A "New class" button is in the top right of the table.

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Download Lessons

1. Click **Courses** on the left.
2. Select a course.
3. Click  **Download lessons**
4. Navigate to your Downloads folder on your computer.
5. Unzip the ZIP file to view the lesson files.
 - a. Resource Guide
 - b. Slide Deck
 - c. Worksheet(s)



The screenshot shows the Intuit for Education dashboard for Wednesday, October 4, 2023. The left sidebar contains navigation options: Dashboard, Classes, Courses, Educator Community, and Professional Development. The main content area displays a greeting to Ms. Roberts and a summary of class performance. A donut chart shows that 2 students are past due, 1 student has completed an assignment, and 0 students are in progress or not started. A video player features a welcome message from an educator. Below this is a table of classes with columns for Students, Chapters assigned, and Completion.

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Intuit Educator Community

1. Click **Educator Community** on the left sidebar to join.

OR

Navigate to

educatorcommunity.intuit.com

2. Add a **username** to complete your profile, then click **Submit**.
3. Start interacting with educators from around the world!



Practice Guide for Prosperity Quest:

- Once in prosperityquest.intuit.com
- enter your nickname
- Select 'Prospera Tech Labs'
- Complete Month 1
- Share your 'financial report' with the group

prosperityquest.intuit.com?cid=evt_intuit_reach_us_intuit-for-education_aw_slide-deck_partners_link_na_intuit-edu



Intuit for Education Highlights here

Topics

- Importance of financial literacy
- Making money decisions
- Banking
- Budgeting
- Savings
- Credit
- Investing
- Career planning
- Paying for college
- Insurance
- Taxes
- Economics
- Entrepreneurial finance

How it works

- Create classes for your students to learn synchronously and asynchronously
- Assign quizzes, homework
- Track student progress
- View student experience
- Short videos to per unit
- Flexible curriculum
- Financial literacy badges

Educator offerings

- Educator community
- Educator training resources
- Live webinar and on-demand library of resources

And Intuit Personal Finance Certification with Certiport coming in October!

All content and videos will be translated into native Latin America spanish by end of 2023

Don't forget to sign up
to Intuit for Education!



Appendix

Young people vs money

Gen Z place high value in financial wellness

Understanding young people's *relationship* to money informs how we teach financial literacy

From Intuit's research on Gen-Z money habits

- 57% of Americans feel anxious going with friends to restaurants and bars they know they can't afford **(70% for Gen Z)**.
- Nearly half of Americans (48%) say they've spent less time with friends or family due to financial constraints **(61% for Gen Z)**
- Young people are **more entrepreneurial** and dedicate time to side hustles

From Quizlet's study on Gen-Z

They view education as a means to an end rather than a status statement, citing minimizing debt as the #1 factor when selecting a higher education path. They also factor work-life balance and mental health into planning for future stability.

They prefer in person experiences to build relationships and foster a sense of community for career opportunities and better mental health.

Cite: <https://investors.intuit.com/news/news-details/2023/Gen-Z-Would-Rather-Talk-About-Anything-But-Their-Finances/default.aspx>

Financial literacy education

The current problem

Financial literacy education is not equitably distributed across all school districts

28 states have some level of personal finance graduation requirement

17 states have mandates in place for students to take a full semester personal finance course to graduate, while **11 states** require personal finance be taught as part of another course.

Students are not graduating financially literate

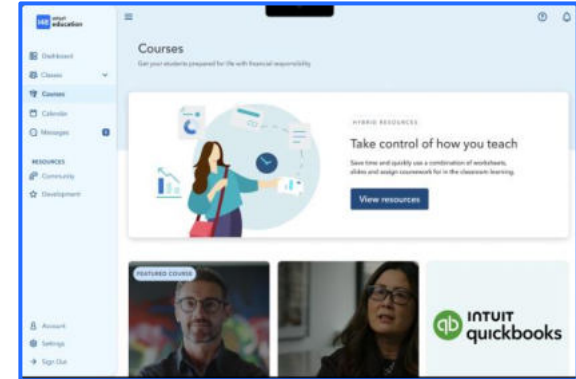
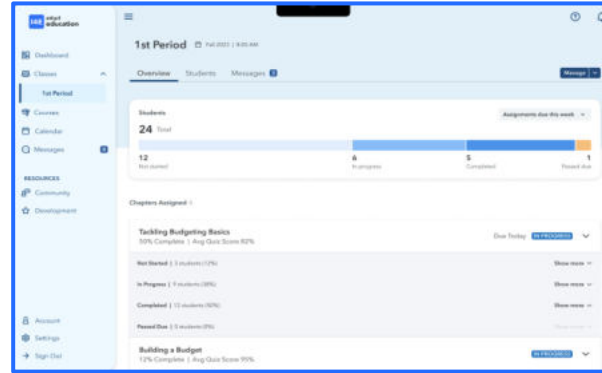
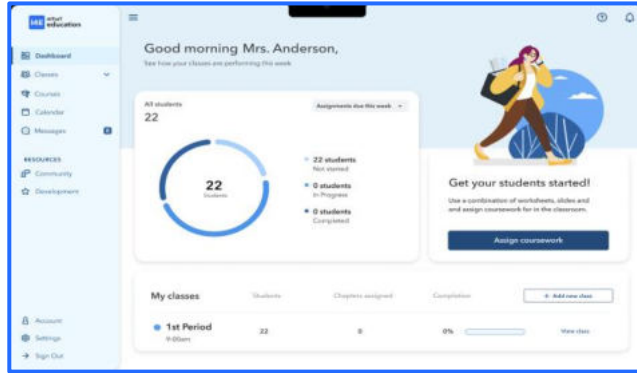
Only 25% of all H.S. students are required to take a personal finance course and that percentage is significantly lower for students in low-income zip codes.

The learning environment negatively impacts students' ability to learn

Only 25% of high school students feel engaged by school due to the typical lecture-based format.

Intuit believes **all students**, regardless of the zip code they are in, deserve the opportunity to be financially literate.

Intuit for Education: Financial Literacy available to everyone - free



✨ ✨ Teach financial literacy using real-world tools ✨ ✨

TurboTax simulation - Mint simulation - Credit Karma simulation Mailchimp simulation - Quickbooks practice

🎮 🎮 Engage students with education games to enhance the learning experience 🎮 🎮

Kahoots for individual units | Gamified experience like leaderboards, music, and timers

Our differentiators for educators - Intuit for Education

By offering a free and easy-to-use technical resource, educators can teach personal finance without taking too much class time

Real World Application

Intuit for Education teaches students how to use real world financial tools, helping them build skills that will translate into real use cases.


Flexible Curriculum

Intuit for Education's lessons are designed to easily flex to any time frame - from an independent homework assignment or hour long segment, to a guided multi-week unit or a semester-long course.

Gamification Solutions

Intuit for Education leverages gamification through our personal finance game - *Prosperity Quest*, Web3D game where students can explore concepts like credit, loans, savings, and investments to get them excited about financial education.

View: Intuit for Education How to Video



How-To:
Create a Class and
Invite Students

Check out our how to videos:

https://www.intuit.com/solutions/education/resources/support/?cid=evt_intuit_reach_us_intuit-for-education_aw_slide-deck_partners_link_na_intuit-edu

View:
Intuit for
Education
Content Video



Sign up for Intuit for Education:

https://education.intuit.com/register?cid=evt_intuit_reach_us_intuit-for-education_aw_slide-deck_partners_link_na_intuit-edu



View: Intuit for Education Simulation

Sales tax calculator: Find rates in your area

Easily calculates sales tax rates in your state with our free tool. Simply plug in your business address and ZIP code to reveal your total estimated tax rate.

Business address [Clear address](#)

Address

City Choose a state

ZIP

*Enter the full U.S. street address for the most accurate rate.

[Get rate estimate](#)

This free service is for illustrative purposes only without warranties. If you intend to rely on these rates, please consult QuickBooks Sales Tax.

0.00%

TOTAL ESTIMATED TAX RATE

0.00%

0.00%

QuickBooks: Understanding Sales Taxes

Please note that in this QuickBooks simulation, some features and links have been disabled so that you can focus on learning objectives of this activity.

QuickBooks is a tool used by businesses to manage income and expenses. This includes collecting sales tax. For business owners, knowing whether you need to charge sales tax is—no surprise!—pretty complex. Especially when sales tax laws make for dry reading and can differ from state to state.

Let's look at the sales tax calculator to see how sales tax varies by location.

Instructions:

Skip the address box.

- 1 - Enter **San Diego** as the city.
- 2 - Enter **California** as the state.
- 3 - Enter **92101** as the zip code.

Sign up for Intuit for Education:
https://education.intuit.com/register?cid=evt_intuit_reach_us_intuit-for-education_aw_slide-deck_partners_link_na_intuit-edu

View: Intuit for Education Assessment

QUESTION 1 / 100

Measure your growth

Why should you learn to handle your money wisely?

- So you can meet your goals and financial objectives
- To become a pro at investing
- To show others you know how to handle your finances
- To avoid paying taxes on what you earn

Submit

Sign up for Intuit for Education:

https://education.intuit.com/register?cid=evt_intuit_reach_us_intuit-for-education_aw_slide-deck_partners_link_na_intuit-edu

Intuit for Education Helping students become financially literate

Intuit for Education offers flexible and interactive curriculum with real world tools, to get students excited about finances

Real World Tools

Confidence

Feel confident that students are prepared to transition to managing their own finances

Apply To Real Life Scenarios

Give students the ability to apply what they've learned to a real world scenarios that they'll encounter as young adults

Credible, & single, Source of Truth

I4E provides a source of truth for financial basics and hot topics, like investing and online banking

Learn, Apply, Assess

I4E helps students apply what they learned and offers assessments to make sure it's resonating with them

Certifications Launch Timing Oct

Teachers can leverage our industry recognized Intuit Personal Finance Certification

Flexibility

Comprehensive Curriculum

Select from turn key personal finance and/or entrepreneurial courses

Differentiated Instruction

Build and pace programs to meet your student's needs and learning style

Hybrid Learning

Whether it's homework or in the classroom, I4E curriculum is designed to support guided or independent environments.

Flexible Ways to Meet Requirements

Designed to meet state mandates and national standards, I4E curriculum can flex anywhere 15 min lesson to full semester course.

Accessibility Across HS Students

I4E is designed to be accessible across all High School reading levels

Interactive

Relevant Applications

Students are excited to learn since lessons are tailored to topics that they can start applying immediately

Dynamic Curriculum

Curriculum is comprised of dynamic videos, simulations, reflections, drag & drop, quizzes, true/false, sort & order

Professional Development

We've got your back for teaching financial literacy, from live webinars to a robust library of quick how-to videos & articles

Educator Community

Connect with your peers to share learnings as your bring financial literacy to your classroom

Gamification FY24 Launch

I4E uses leaderboards, timers, and game-style music to simulate friendly in-class competition

INTUIT PERSONAL FINANCE CERTIFICATION

Based on national financial education standards

- Council for Economic Education (CEE)
- JumpStart

Exam Format

- 50 minutes
- About 40 questions
- Immediate results

Full Certiport Pathway

- Learn
- Practice
- Certify

Objective domains

- Saving
- Managing credit
- Managing risk

Industry-Recognized

- Printed certificate
- Credly digital badge
- Intuit brand

Full objective domains:



Coming soon! November 2023