



Guidance notes to prepare for your session in a one-to-one setting

# ‘Keeping my money safe’

**Suitable for 5-7 years old**

This material is intended for information purposes only and does not constitute advice or a recommendation.



LLOYDS BANK

# Using this guide to deliver financial capability in a one-to-one setting

If you are delivering this session to an individual child, this delivery guide is here to support you.

You'll see from the other resources, such as the PowerPoint and resource sheets, that these activities have been designed with group delivery in mind (for example in a classroom setting). However, this guidance has been prepared so that you can use the same resources successfully with a child, either at home or in another one-to-one environment.

The resources have been developed to use with children age 5-7 years.



They provide a lot of different things to discuss, think about and do.



The activities don't require lots of extra materials – only things you may already have.



You will need access to the Internet and either a PC, laptop or tablet.

**Our relationship with money is developed through childhood and adolescence. Financial wellbeing means having the confidence and knowledge that you are in control of your money - you can manage your day to day living expenses as well as planning for the future and being able to cope when the unexpected happens.**

# Keeping my money safe

Four activities to use with children

**There are PowerPoint slides to use with every activity and some other resources that you can view on screen or print off. For some activities, there may be suggestions on alternative ways to do them for differing learning needs.**



## **‘What’s in my wallet / purse?’**

### **A DISCUSSION ACTIVITY**

Here, they will learn about the value of coins and notes. They’ll also begin to learn about other forms of money, such as plastic cards and digital payments. They’ll begin to see how we might keep money safe, as well as how we protect our other valuables.



## **How safe?**

### **A DOING ACTIVITY**

In this activity, they are asked to put in order places to keep money, from least to most safe.



## **Sasha’s Big Day**

### **A LISTENING ACTIVITY**

This is a short story where children get to act as ‘experts’. They’ll be able to advise Sasha on what he should have done to keep his money safe.



## **What we have learnt today**

### **A THINKING AND REFLECTING ACTIVITY**

In this activity, they will think and reflect on what they have learnt across the whole session. There is guidance provided to help you to do this.

# The resources you will need:



## Laptop or tablet

The **PowerPoint presentation** for you to view together.

*These are the slides to use with the activities.*

*Some slides may require you to skip or 'click' to access the different stages of the slide animation.*



## Resource sheet

*There are other resources that you will need to view on screen, or you can print them off if you are able.*

### Resource sheet: 'How safe?'

*Diamond shape and cards to be cut up.*



## Certificate of achievement

*A completion certificate, alongside some further activities to do after the session.*

## Paper/coloured pens /glue sticks

# Completing the activities with children will help them to:



Recognise the value of notes and coins.



Know that money comes to them and to others in different ways.



Know that money can be kept in different places, and that some places are safer.



Choose a suitable place to keep money safe and explain their choice.



Begin to understand the consequences of losing money, and how this makes them, and others feel.

## These activities can also contribute to the school curriculum:

### Personal, Social and Health Education (PSHE):

- The role money plays in their lives, including how to keep it safe.
- Healthy relationships, including our relationship with money.

### Mathematics:

- To be able to recognise the value of notes and coins.
- To use money as a context for solving multi-step problems.

You may want to share this with the teachers in their school or those who support children with their learning.



# What's in my wallet/purse?

This gets children thinking about what money looks like in different forms, and helps them begin to think about why it is important to keep it safe.

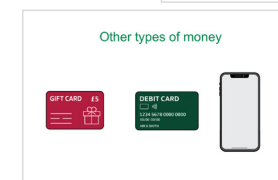
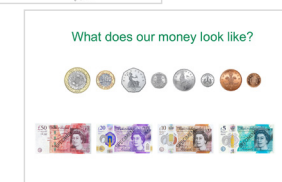
## An alternative way to do the activity:

You can choose to use a real wallet or purse. If you do, make sure it contains some of the items on the **slide 3**.

## YOU WILL NEED

✓ **Skip PPT slides 1 and 2**

✓ **PPT slides 3, 4 and 5**



✓ **Your own wallet or purse**  
(optional)



## What's in my wallet/purse?



Show **slide 3** with the picture of the wallet and purse.

### Ask:

? What do you think might be inside?

### Possible answers:

They will probably say 'money' first.

? What kind of money?

To lead them towards recognising coins and notes.



Show a selection of coins and notes on **slide 4**.

### Ask:

? Do you recognise the coins and notes, and can you name them?

You can use the images of coins and notes to describe the different coins and notes and explain that they have different values.

### Explain:

We can use money to buy the things we want and need.



Show them the gift voucher /card/debit card on **slide 5**.

### Ask:

- ? Do you know what they are?
- ? Are they the same as money?
- ? Do we also have to keep them safe?
- ? Do you know of any other ways to pay?

They may have seen you using a phone or a watch to pay for things.

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## What's in my wallet/purse?



**What else might be in the wallet or purse?**

**Possible answers:** Receipts, photograph of a family member or pet.



**What things in our wallet or purse might we want to keep safe? What are the things we value?**

**Possible answers:** Money, photograph of family member or pet. You should highlight that money might not be the only thing in their wallet or purse they want to keep safe.

**Finally, ask:**



**Do you know of any other ways to pay?**

You can use their answers for the next activity. It will help them to learn about other safe places to keep money.





# How safe?

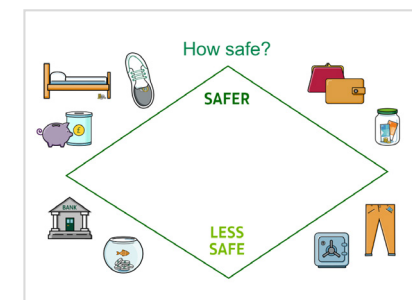
This gets children to think about places we can keep money and to consider which of those places are safe (or risky) to keep money.

## An alternative way to do the activity:

View the 'Resource Sheet - How safe?' on a laptop or tablet and have a discussion about how safe each option to keep money is.

## YOU WILL NEED

✓ **PPT slide 6**



✓ **Resource Sheet - How safe?**  
Printed with the image cards cut up.



✓ **Glue sticks**



## How safe?

### Ask:



**When we say we are keeping something safe, what do we mean?**

**Possible answers:** We are protecting something (our money) and preventing it from being lost or stolen.

**Use the 'How safe?' diamond shape and cards.**

Cut up the cards and ask them to arrange the pictures on the diamond from top to bottom according to which they think are most safe (top) and least safe (bottom).

### Ask:



**Do you want to add any other places too?**

They can draw this and put it on the diamond.

**Discuss their choices with them.**

### Ask:



**Why have you put this on the top/the bottom?**

When they are sure about their ordering, they can glue their pictures on to the diamond.

**When they have finished, discuss their decisions with them.**

### Questions you can ask are:



**Why do you think some places are safer than others?**



**Are there any safe places you haven't thought of?**



**Why would some people like to use a money box and others a bank?**



# 'Sasha's Big Day'

This story helps you to recap what they have learnt about the importance of keeping money safe.

Begin by telling the story of 'Sasha's Big Day'. You can use **slide 7** to show pictures relating to the story – you will need to click on the slide to animate it and show each picture.

You can encourage the child to act as an expert. There are questions that you can ask throughout and at the end of story on the **resource sheet**.

**Discuss what happened to Sasha and the consequences.**

## YOU WILL NEED

✓ **PPT slide 7**



✓ **Resource sheet - Sasha's Big Day**





## Think and reflect

This is an opportunity for a child to think and reflect on what they have learnt from the activities.

This activity could just be a short conversation, or you might like to use the question to give some shape to it.

### Ask:



**What advice would you give to someone about keeping their money safe?**

- At home.
- Going out to the shops.
- When you go on holiday.

### Ask



**How does having money make you feel?**



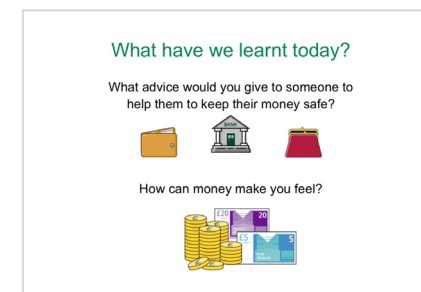
**How does losing money make you feel?**

### Some extra things to do:

You can finish by giving them the **certificate of achievement** to show what they have achieved. This provides more activities to do and things to discuss, as well as some suggestions of where to find out more.

## YOU WILL NEED

### ✓ PPT slide 8



### ✓ Skip PPT slide 9

### ✓ Printed certificate (optional)

