**Exploring** Financial Identity through Social Sciences

Understanding financial identity

**Financial identity is the values, knowledge, skills, and behaviours that shape how people build financially healthy lives**

About this resource

This resource supports learners to understand what impacts on financial wellbeing.

View the Level 4 and 5 achievement objectives related to this learning experience [here.](https://sortedinschools.org.nz/api/v1.0/download?files=310)

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# SOLO taxonomy

The learning experiences in this resource are aligned to SOLO Taxonomy to ensure cohesiveness, constructive alignment and cognitive stretch for all learners. This gives you choices throughout the learning process.

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|  **Need it/Know it** | A picture containing text  Description automatically generated **Think It/Link it**  | A picture containing icon  Description automatically generated **Extend it/Defend it**  |
| Make connections to what you aready know. This is the starting point for new learning. | Link your ideas and make connections to build new knowledge and understandings. Learn about the perspective and insights of others. | Extend your learning by applying it to new contexts. Find evidence, validate sources, summarise your thinking and present your findings to clarify.  |

# Sorted themes

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Managing my money

Goals

Debt





Saving

 Learning experiences

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|  **Need it/Know it**  |  **Think it/Link it**  |  **Extend it/Defend it**  |
| Make connections to what you already know. This is the starting point for new learning about your **financial identity**.**Identify** the values, attitudes, behaviours and skills that shape your money/moni choices.**Describe** your first memory of money/moni. Take the [Sorted money personality test.](https://sorted.org.nz/tools/money-personality-quiz)**List** ways that a teenager can save money/moni.**Describe** what short-, medium-, and long-term goals/whāinga paetae are.**Read** these [resources on setting goals/whāinga paetae](https://sortedinschools.org.nz/students/activities/?category=&tag=goals&start=0&limit=6), the [setting financial goals infographic](http://sortedinschools.org.nz/api/v1.0/download?filename=goals-infographic&files=258) and the PowerPoint on setting financial goals/whāinga paetae.**Read** these budgeting/tahua resources: [managing my money infographic](http://sortedinschools.org.nz/api/v1.0/download?filename=managing-your-money-infographic&files=257) and the PowerPoint on budgeting/tahua.**Define** the following terms:* koha
* fa'alavelave
* tithing
* remittances
* charitable giving

Watch [Culture Is a Beautiful Thing*.*](https://www.facebook.com/cffc.org.nz/videos/pacific-voices%3A-culture-is-a/994324510717771/) **Discuss** ways that culture shapes Tala’s money/moni choices.**Discuss** the meaning of this whakataukī and how it relates to well-being:Ehara taku toa i te toa takitahi, he toa takitini.*Success is not the work of one, it is the work of many.*  | Link your ideas and make connections to build new knowledge and understandings about your **financial identity**. Learn about the perspectives and insights of others.**Explain** factors have shaped your values, attitudes, behaviours, and skills regarding money/moni. Share this information with five classmates. **Identify** common factors that shape people’s money/moni choices.**Complete** this [supermarket shop activity](http://sortedinschools.org.nz/api/v1.0/download?filename=needs-vs-wants-the-supermarket-shop&files=44).Take the [Sorted money personality test.](https://sorted.org.nz/tools/money-personality-quiz) **Analyse** the strengths and weaknesses of your money personality. **Explain** why you have classified them this way.**Invite** a financial expert from your iwi, hapū, whānau or community to talk to the class virtually or in person.Before the talk,prepare five questions about goal setting/whāinga paetae, managing money/moni, saving/te whakaputu, or managing debt/nama. **Interview** a person from a different cultural background about their values and beliefs related to money/moni. Prepare questions beforehand and record the interview. **Reflect** on who and what have shaped your own attitudes to money/moni and include this in the recording.Readthis [newspaper article](https://www.stuff.co.nz/business/money/97540331/100000-maori-to-be-surveyed-on-their-attitudes-to-money) about the relationship between Māori identity and money/moni. **Discuss** the concept of collective wealth. **Compare** financial well-being as an individual with financial well-being shared by a group.Read[this article on community finance](http://www.scoop.co.nz/stories/BU1804/S00341/vaka-tautua-joins-community-finance-programme.htm). **Explain** the benefits of this service. **Explain** how plans for managing or saving/te whakaputu your money/moni help individuals, whānau, organisations, and governments to reach their goals/whāinga paetae. **Explore** somecollective approaches to saving/ie whakaputu, such as this [iwi run savings scheme](http://www.nzherald.co.nz/business/news/article.cfm?c_id=3&objectid=11680586). **Investigate** whether there are any similar schemes in your community.Research and **explain** the concept of either tithing or giving to charity. **Explain** how giving money/moni to organisations benefits communities in New Zealand. **Read** [Why my generation struggles with this loving Samoan tradition](https://www.stuff.co.nz/life-style/90454636/why-my-generation-struggles-with-this-loving-samoan-tradition). Create a Plus Minus Interesting (PMI) table that shows different points of views on fa'alavelave. **Investigate** the cultural practice of sending money/moni to families overseas and **explain** its value to communities here and overseas. | Extend your learning by applying it to new contexts. Find evidence, validate sources, and summarise your thinking. Present your findings to clarify your **financial identity.****Reflect** on what has shaped your attitudes to money/moni, including who you are, where you live, key people in your life, and your community. **Create** an infographic showing your financial identity.**Create** a visual representation of your financial heritage (your past), your financial present, and your financial future, including what you would like to do for future generations.**Create** a class [Padlet](https://padlet.com/) and invite teachers, whānau and the school community to join. Encourage participants to ask questions about finances, with a particular focus on debt/nama, savings/te whakaputu, financial goal setting/whāinga paetae and managing money/moni. Create a roster with small groups of students taking turns to research and respond to questions. Check that your answers are correct using the [Sorted](https://sorted.org.nz/) website and the [Sorted tools](https://sortedinschools.org.nz/students/activities/?category=&tag=goals&start=0&limit=6), Powerpoint presentations and infographics that come with this resource. **Evaluate** what it means to live a wealthy life. Use [**Tinkercad**](https://www.tinkercad.com/search/?q=baskets) to createa digital kete. Add taonga that represent your interpretation of a wealthy life. Put related words, pictures, headlines, or photos in the kete.**Investigate** Māori businesses and initiatives in your community. Research how values and traditions of te ao Māori shape the way these businesses manage their money/moni, including the ways they work to support future generations. Create a resource that explains the purpose and value of practices such as koha, Christmas gift-giving, tithing, giving money/moni as a gift, and fa'alavelave.Watch [Culture Is a Beautiful Thing.](https://www.facebook.com/cffc.org.nz/videos/pacific-voices%3A-culture-is-a/994324510717771/) **Suggest** ways for Tala to manage her personal, family and community commitments. Include advice about saving/te whakaputu, debt/nama and managing money/moni. Remember to respect cultural traditions and personal choices. |



**Tip: Pick different learning experiences from each column to build a framework of lessons that differentiates your classroom**