



Personal
Finance
Society

MY PERSONAL FINANCE SKILLS



Financial Education self-assessment form

This form has been created to prepare you before going into a school but also to help you reflect on the experience following a session.

To help you prepare to lead your financial education workshop at we have introduced a simple **financial education sign-off process**. To complete the process, we ask you to complete the following tasks.

1. Read through the presentation guide for your workshop. These guides can be accessed in the 'document links' tab [here](#).
2. Watch the online training webinar for your workshop.
 - [Loans and Mortgages](#)
 - [Making decisions and risk](#)
 - [Moving on from school](#)
 - [Understanding credit and debit](#)
 - [Staying safe from scams](#)
 - [Opening your first bank account](#)
 - [My Future Finances](#)

For Discover Fortunes, the training video can be found [here](#).

3. Once you have read through the presentation guide and accessed the online training webinar, we would recommend you do a 'dry run' and complete the form below.

Personal Finance talks

If you are doing one of our personal finance talks, you are not required to do Step 2 of the above as this is more of a talk than an interactive workshop.

Using Virtual Platforms

If you need support on how to navigate through MS Teams, Zoom and other platforms or have any questions, please get in touch with us to book a 15-minute refresher session. Email the team at volunteers@thepfs.org to schedule a session.

Name:

Name of session:

Prior to doing a practice run, make sure you have done the following:

	Checklist
Read through the workshop presentation guide.	
Read through the session PowerPoint in presentation mode	
Watched the training webinar in full (if applicable)	
Have the following resources: <ul style="list-style-type: none"> • The session PowerPoint • The presentation guide 	



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<ul style="list-style-type: none"> • The accompanying student worksheets (for in-school only) • The feedback forms (for in-school only) 	
Have the correct number of worksheets and feedback forms for students (worksheets to be sent prior to the session taking place)	
Conducted a virtual test of the platform to ensure you can share screen (for virtual only)	
Booked a 15 minute "Using Virtual Platforms" session (if required)	

Following your practice run, tick the answer that best fits the statement:

	Strongly agree	Agree	Disagree	Strongly disagree
1. I had all the information and resources that I required prior to the session.				
2. I was able to deliver the session within the 1 hour and allowing time for feedback				
3. I felt confident in my ability to answer questions on the topic				
4. The PowerPoint and presentation guide supported my delivery of the session				

5. Reflecting on your session, suggest an area that you think you could improve on. (e.g. *I found that I ran through the session too quickly / I should have spent more time checking the PowerPoint before the session*).

6. Any further comments:

Please submit your completed self-assessment form to volunteers@thepfs.org. For any questions, please contact us and we will be more than happy to assist!