

Instructions for Workshop Leader

Use these slides (in order) with the sections of your session outline.

Welcome and Overview (Slides 2-4)

Activity (Slides 5-9)

Present (Slides 10-14)

Discuss (Slide 15)

Review and Evaluate (Slides 16-23)

Close (Slide 24)





Budget Well

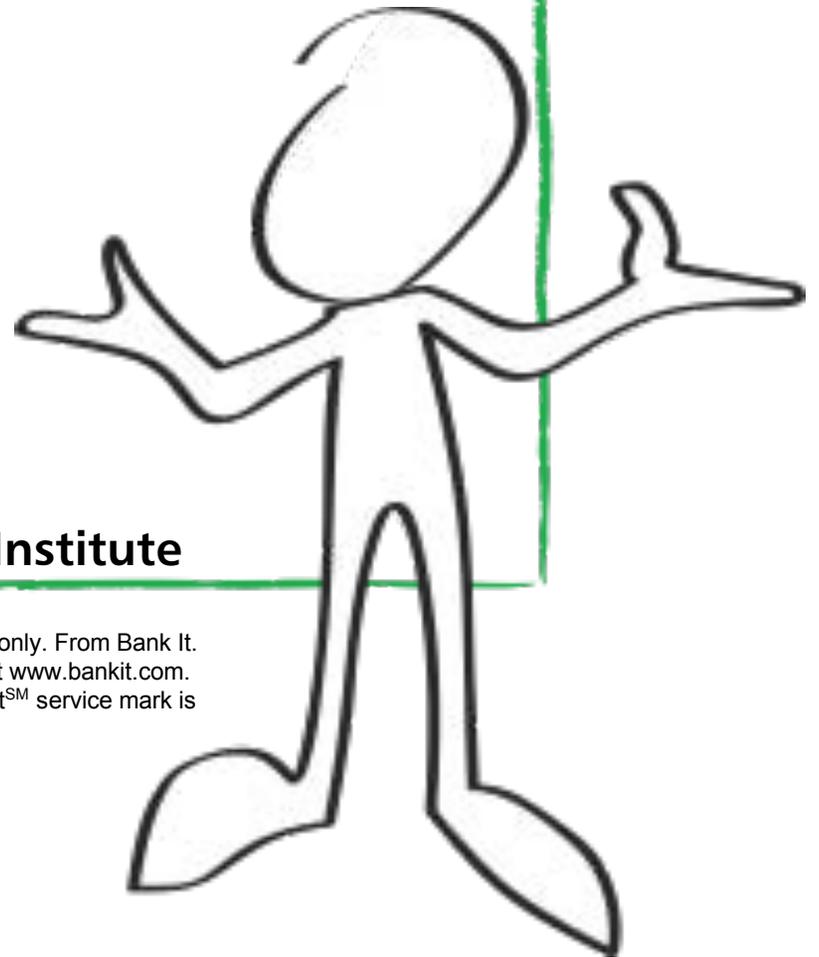
Welcome to Bank It

Keeping Track of Your Receipts

2-BU-PT

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Welcome and Overview

What is Bank It?

Bank It delivers real-world topics and tools to help you:

- Understand,
- Talk about, and
- Manage your money.

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Welcome and Overview

Three goals for today:

1. Identify at least two kinds of receipts.
2. Explain what a return policy is.
3. Describe what an extended warranty is.



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Activity

A receipt is a paper record of a money transaction.



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Activity

How important?



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Activity

What are the different kinds of receipts you get?



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Activity

Why is it important to keep receipts?



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Activity

Sample receipt



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Present

A return policy includes rules that a store creates about returning items.



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Present

A return policy includes:

1. What is required for a return
2. Length of time during which an item can be returned (for example, within 30 days of purchase)
3. Which items can—or cannot—be returned



Present

A warranty:

1. A time period during which the maker of the product will repair or replace a defective item
2. A list of what is considered defective and not defective



Present

An extended warranty:

1. Extending the timetable of the warranty for an additional cost
2. A form of insurance



Present

How do you decide when to purchase an extended warranty?



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Discuss

Turn to talk to someone near you.

1. Say your first name.
2. What has been your most successful experience in returning an item?



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Review and Evaluate

What is a receipt?

A paper record of a money transaction.



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Review and Evaluate

What are different kinds of receipts?

- For a cash purchase
- For a credit purchase
- For a debit purchase
- For an ATM transaction



Review and Evaluate

Why is it important to keep receipts?

1. To help you budget well
2. To return something
3. To question an error on a bank or credit card statement
4. Proof of purchase
5. Tax purposes
6. Product warranties and extended warranties



Review and Evaluate

What is a return policy?

The rules a store creates about returning items.



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Review and Evaluate

What is usually included in a return policy?

- Items you need for the return
- The timeline for the return
- Whether you're allowed to return a certain item



Review and Evaluate

What do you need to return an item you purchased?

1. Receipt
2. Actual item
3. Original packaging



Review and Evaluate

What is a warranty?

A time period during which the maker of the product will repair or replace a manufacturer's defect of an item.



Review and Evaluate

What is an extended warranty?

A form of insurance purchased by the consumer to extend the warranty.



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Close

Saving receipts can help you make positive money choices.



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