



WELCOME PACKET & AGENDA

2024 NATIONAL PERSONAL FINANCE CHALLENGE - FINALS

May 19-20, 2024 || Cleveland, Ohio

Dear Students, Teachers/Coaches, and Parents:

Congratulations on your team's success in Council for Economic Education's (CEE) **National Personal Finance Challenge!** We look forward to hosting your team in Cleveland to celebrate your achievements and compete for the National Champion title!

AWARDS AND RECOGNITION

1st place: **\$2,000** | 2nd place: **\$1,000** | 3rd place: **\$500** | 4th place: **\$250**

Below, you will find detailed information about your trip and the event details. Please read this welcome packet thoroughly and if you have any questions, please contact us at rivera@councilforeconed.org or heckstein@councilforeconed.org.

***** Required:** Students must bring their own laptops to work on. These laptops must have USB inputs/input capability.

See you in Cleveland!

COMPETITION AGENDA

Dates: May 19-20, 2024, Cleveland, Ohio

SUNDAY, May 19, 2024: Competition Check-in, Hotel Check in, Pick-up Student Packets

- **1:30 PM - 6:00 PM**
 - Team Registration and Team Check in
 - Hero shots and one question
- **6:00 - 8:00 PM Opening Dinner**
 - *Welcome*
 - *Instructions on what to expect at the NPFC*
 - *Ice Breakers*
 - *Dinner*
 - *Team Interviews during Dinner*

MONDAY, May 20, 2024: The Championship Competition

- **6:45 AM**
 - Suggested departure time for Cleveland Federal Reserve Bank
- **7:00 AM – 8:00 AM**
 - Teams Check in * and are ushered to 10th Floor
- **7:30 AM – 8:30 AM**
 - Breakfast
- **8:45 AM – 8:55 AM**
 - How it Works and Case Study Distributed
- **8:55 AM - 9:55 AM Case Study: Fictitious Family Scenario**
 - Teams are given the case study and have 1 hour to prepare
- **8:55 AM - 1:20 PM**
 - Museum Tour, activities, lunch for Teachers
- **10:00 AM - 1:20 PM Case Study Presentations**
 - Student teams present to one of four judging panels
 - Activities will be hosted in the main room
 - Lunch will be out starting at 12:00 PM
- **12:00 AM - 1:15 PM Lunch**
 - Grab and Go student lunch in main auditorium
- **1:15 PM - 1:25 PM**
 - **Break**
- **1:30 PM - 1:45 PM**

- Advancing teams announced
- **1:45 PM - 2:15 PM**
 - Quiz Bowl Round #1
 - 16 Teams will compete for a spot in the top four.
- **2:30 PM**
 - Finals Program Begins
- **2:45 PM - 3:20 PM** Quiz Bowl Round #2
 - Top four teams from round 1 compete for the National Championship
 - Teams are awarded 4th, 3rd, 2nd, and 1st place
 - Photos
 - Closing Remarks
- **3:30 - 3:40 PM**
 - Awards Presentation
 - Teams are awarded 4th, 3rd, 2nd, and 1st place
 - Photos
 - Closing Remarks
- **3:45 PM**
 - End of Program

THE CASE STUDY

- Each team will be given a case study of a fictional family scenario.
- Teams will have **one (1) hour** to prepare a plan for that family and submit their work to CEE.
- Teams will present their plan to a panel of judges. Teams will be given a maximum of **10 minutes** to give their presentation and **5 minutes** to answer any questions.
- Judges will rank the teams on personal finance content knowledge (80%), teamwork (10%), and presentation skills (10%).

The following are strictly prohibited and will result in disqualification and immediate removal from the competition:

- Students may access the internet for research; However, use of cell phones/smart watches during the case study work time is prohibited.
- Accessing any previously saved data, research, or other files including Dropbox or Google Drives is prohibited.
- Even the appearance of impropriety will lead to disqualification.

Additional Resources for Your Team:

- Sample case studies: <https://npfc.councilforeconed.org/national-finals/>
- Watch this video of a NPFC's team financial plan presentation for the Hernandez case study. At the 22-minute mark, you will see the NPFC judging rubric and judge's commentary: <https://youtu.be/SIkB-kdBbPI>

THE QUIZ BOWL ROUNDS

This year, CEE has updated the format of the NPFC Finals Competition. Once teams present their financial analysis to their judging panel, the top ranked teams will advance to a round of 16 quiz bowl. Four teams will go head-to-head in each of the four judging rooms, and the top four highest-scoring teams will advance to the Final quiz Bowl Round.

Further Rules and instructions will be provided to teams advancing.

HOTEL ACCOMMODATIONS

All teams will stay at the **Westin Cleveland Downtown Hotel**, 777 St Clair Ave NE, Cleveland, OH 44114.

- The hotel accommodation is provided for 1 night/2 days.
- Room assignments include up to four same gender teammates per room.
- If teams consist of mixed-gender students, two double rooms will be provided.
- Team coaches will each have their own room.
- Only assigned guests are permitted to stay in each room.

TRANSPORTATION

- You and your team are responsible for arranging transportation between your hometown and the airport, as well as the airport and to the hotel (for both your departure and return). CEE **will not** cover travel from state of origin to Cleveland.
- The Greater Cleveland Regional Transit Authority (RTA) offers service to and from Cleveland Hopkins International Airport. RTA's Red Line provides regular service between CLE and downtown Cleveland via the Tower City Station. The trip takes less than 30 minutes and trains depart from CLE every 15 minutes for the majority of the day. For more information visit:
<https://www.clevelandairport.com/parking-transportation/public-transportation>

CHECKING IN

* **Upon arrival go to the hotel's registration desk to check-in.** Hotel check in is at 4:00pm. If your team is arriving early you must request early check-in in advance of

arrival by emailing heckstein@councilforeconed.org or mhiggins@councilforeconed.org. Early check in is not guaranteed however, the bell hop can store your bags until check in. When you've completed your hotel check-in and have arrived within CEE's registration window (see times below), please make your way to check in with the CEE staff.

REGISTRATION WILL BE HELD AT:

- Saturday, May 19: **1:30 PM - 6:00 PM**, Stenia Room

INCIDENTALS

Incidentals have been blocked (long distance telephone calls, mini-bar, bottled water, and pay-per-view movies). Teams wishing to unblock incidentals will be expected to provide a credit card at check-in.

WI-FI

Free Wi-Fi will only work in the guest rooms (up to 5 devices), but not meeting rooms. CEE will provide Wi-Fi only for planned activities on Sunday.

CHECKING OUT

- All teams are expected to check out of their hotel rooms in the morning.
- Upon check-out on Monday, please bring all luggage to the lobby where you may store your baggage at no cost in the bellhop area. This room will remain open for teams to place their bags before departure in the morning, and it will be open at the end of the day for baggage pickup before departure.
- Depending on flight availability, some teams may depart the following morning (Tuesday, May 21) – **this must be pre-approved by CEE.**
- Your team will be responsible for additional nights of stay before or past pre-approved dates.

OFFICIAL PICTURE ID, NAME TAGS

Please carry your official/state picture ID throughout the weekend, and please wear your nametag during all weekend events to help us identify you and your team. If you lose your name tag, please let us know so we can replace it. The competition will be held at the Federal Reserve Bank of Cleveland. You will be required to show your identification upon entering the building, and you are required to wear your nametag at all times while in the Cleveland Federal Reserve Building.

DRESS CODE

Registration and Opening Dinner - Casual
NPFC Finals Competition May 20 - Business attire

RULES OF CONDUCT

For an enjoyable experience and for the safety of all travelers, all students and team coaches must comply with the following rules of conduct:

- Each team is limited to four students and one coach/chaperone.
- Every team coach/chaperone is responsible for keeping their team members together during transfers and in-transit to and from event sites.
- Each team's coach/chaperone is responsible for the overall supervision and behavior of their students.
- Team members are prohibited from possessing or using any illegal drugs, alcohol, tobacco products, or weapons. Anyone found in the possession of any of these items will be immediately disqualified, and the team will not be allowed to advance.
- Team members will stay in the accommodation assigned to them.
- Teachers will be assigned a single room near their team members.
- Should any problems arise, team members should immediately report to their coach or a CEE staff member. **In case of an emergency, please call 911.**
- Each team member is fully responsible for their own personal items and baggage.
- Each team member is responsible for notifying CEE of any special health issues, or dietary needs and requests.

HELPFUL TRAVEL INFORMATION

- Confirm your travel 1–2 days prior to departure with the airline directly.
- Please remember to bring a copy of your itinerary and the travel memo when you travel, as well as an official government issued ID.
- Check the TSA's website for the most up-to-date carry-on restrictions:
<http://www.tsa.gov/>
- Many bags look alike, make sure your luggage has an identification tag. It is recommended that you put something on your checked luggage (i.e. a ribbon or sticker) that you will be able to clearly identify your bag on the carousel.
- Please carry your passport or government issued ID, travel itinerary and money with you at all times while traveling.

- Make a copy of your documents and other vital information. Keep these copies in a place separate from your passport as a safety precaution in case your passport or ticket is lost or stolen.
- In case of a travel emergency or canceled flight, please contact a CEE staff member.
- For those flying, check your airline's website for details about allowable size/weight of luggage and if fees apply for checked or carry-on luggage. Most airlines allow a carry-on, and a personal item such as a laptop bag or purse and one piece of checked luggage – but you should verify.
- **CHECK FOR MORE UPDATES ON U.S. TRAVEL WEBSITES**

GUESTS/ADDITIONAL CHAPERONES

Any state affiliate/coordinator who wishes to attend the National Finals is responsible for making their own travel arrangements and notifying CEE. Parents of students competing who wish to attend are responsible for making hotel and travel arrangements. CEE is not responsible for these individual guests and cannot guarantee their participation in group activities. Additional Chaperones required for the team to travel will not be covered under the team's hotel block, and the team coach must notify CEE of any additional chaperones attending. All guest travel, lodging, and associated expenses will not to be covered or handled by CEE, and student lodging, expenses, and activities do not include guests of the student.

You are required to inform CEE if there is a guest, and provide full name, contact information and relationship to participants. **Please fill out [this form](https://councilforeconed.wufoo.com/forms/r5axun01p671qs/) by May 5, 2024** (linked here: <https://councilforeconed.wufoo.com/forms/r5axun01p671qs/>)

ANY QUESTIONS?

If you have any questions, please contact the Economics Challenge team by emailing Ruben Rivera at: rivera@councilforeconed.org or Hannah Eckstein at: heckstein@councilforeconed.org.

ABOUT THE COUNCIL FOR ECONOMIC EDUCATION

The **Council for Economic Education** (CEE) is the leading nonprofit organization in the United States that focuses on the economic and financial education of students from K-12, and we have been doing so for 70 years. We carry out our mission by educating the educators: providing the curriculum tools, the pedagogical support, and the community of peers that instruct, inspire, and guide. All resources and programs are developed by educators and delivered by our national network of affiliates. Each year

CEE's programs reach 55,000 teachers in person, and more than 1.1 million unique visitors via EconEdLink.org – CEE's go-to place for free online teaching resources.

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