

NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

## ACTIVITY

## Finding the Right Financial Fit

**What + Why:** Compare financial institutions and tools to see how different options manage money—and what might matter when saving for something big.

**Supporting Materials:**

Financial Institutions, Tools & Services Comparison (Case Study)

### Part 1

**Instructions:**

Use the Financial Institutions, Tools & Services Comparison chart to answer the questions below. Use evidence from the chart to support each of your claims.

1. What is the difference between a financial institution and a financial tool/platform based on this table?
2. Which features seem designed for convenience, and which seem designed for security?
3. What trade-offs appear between convenience, access, cost, and security?

## Part 2

### Instructions:

Use the Financial Institutions, Tools & Services Comparison chart to apply your knowledge to various profiles. Use evidence from the chart to support your claims.

1. Review the profile cards provided.
2. Which financial institution would best fit this person's situation based on the chart?
3. What products, services, and/or feature(s) from the chart helped you make that decision?

My Group's Assigned Profile is: \_\_\_\_\_

Circle which you think matches best:

Commercial Bank | Credit Union | Online Bank

Explain your reasoning:

## Part 3

### Instructions:

Connect the Financial Institutions, Tools & Services Comparison chart back to the Transportation Situation case study.

1. Looking at this chart, what features or trade-offs might Jordan need to think about when deciding where to keep money while saving for a car?

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## PROFILE A

### Limited Internet Access

- Internet access is inconsistent
- Needs to handle money in person
- Prefers face-to-face help

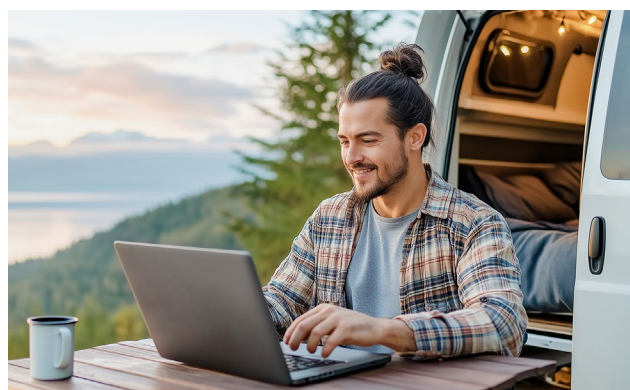


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## PROFILE B

### Frequent Traveler

- Travels often and moves a lot; works remotely
- Needs access to money in many locations
- Wants fewer location-based limits



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## PROFILE C

### Community-Focused

- Cares about supporting local businesses
- Likes the idea of being part of a community
- Willing to trade some convenience for values



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## PROFILE D

### First-Time Account Holder

- Has never had a bank account before
- Wants something simple and clear
- May need extra guidance getting started

