

NAME: _____

DATE: _____

ACTIVITY

Plotting Amara's Pathways

What + Why: Build your own combination of pathways across Amara's financial life and defend why it creates strong long-term financial independence.

Supporting Materials:

Case Study Resolution (Case Study)

Saving vs. Investing: Pathway Outcomes (Ages 18-22) (Case Study)

Investing Pathways: Asset Growth & Inflation Impact (Ages 23-30) (Case Study)

Risk Management Pathways (Ages 31-36) (Case Study)

Long-Term Planning Pathways (Age 67+) (Case Study)

Instructions:

1. Review the guardrails.
2. Choose one pathway from each topic to create your combination.
3. Organize evidence and reasoning in the Planning Frame, using the case study materials listed.
4. Identify at least one trade-off or cause for concern in your combination.
5. Prepare to use this planning frame during the final independent reflection.

Before You Start Writing . . . Review These Guardrails!

Your combination must:

1. Include one pathway choice from each of the four topics (Your combination must span Amara's full financial life.).
2. Use a mixture of at least two pathway letters (A, B, or C). You cannot use the same letter for all four topics.
3. Acknowledge at least one stage where your combination is not the strongest choice, and explain why the overall combination is still worth it.
4. Cite evidence from at least two different case materials by name.

My Combination

Topic 1: _____

Topic 2: _____

Topic 3: _____

Topic 4: _____

Case Study Evidence Notes

Use the Planning Frame to organize important evidence, data, and examples from the case study materials that may help support your Final Claim later.

Planning Frame

Case Study Material	Important Evidence or Data
Saving vs. Investing Pathways (Ages 18-22)	
Investing Pathways: Asset Growth & Inflation Impact (Ages 23-30)	
Risk Management Pathways (Ages 31-36)	
Long-Term Planning Pathways (Age 67+)	

Connection Notes

Use the following space to organize how different financial decisions connect across Amara's life over time. Think about how choices in one topic may affect later outcomes in another topic.

Financial Topic	Notes
Saving	
Investing & Diversification	
Risk Management & Protection	
Long-Term Planning	

Trade-Off Notes

1. What is one genuine trade-off or cause for concern in this combination?

2. Why is the combination still worth it overall?