

Personal Finance Curriculum Provider Alignment Tool for Grades 9-12

Purpose: This tool is designed to assist personal finance curriculum providers in documenting how their resources align with the statutory requirements for the standalone personal finance course mandated by [Assembly Bill 2927](#). The information you provide in this document will support districts and teachers in selecting free, high-quality, topic-aligned instructional materials that meet the needs of California’s diverse student population.

Company Name	Contact Information

Section 1: Statutory Requirements Alignment

13 Statutory Requirements	Does your curriculum address this requirement?	Supporting Details (If Partial or Additional Comments)	Sample Lesson (Attach or Link)
1. Fundamentals of banking for personal use, including but not limited to, savings, checking, minimizing fees, and digital finance.	☐ Yes ☐ No ☐ Partial		
2. Principles of budgeting for independent living.	☐ Yes ☐ No ☐ Partial		
3. Employment and factors affecting net income, including the topics described in subdivision (a) of Section 49110.5 .	☐ Yes ☐ No ☐ Partial		

13 Statutory Requirements	Does your curriculum address this requirement?	Supporting Details (If Partial or Additional Comments)	Sample Lesson (Attach or Link)
4. Uses and effects of credit, including managing credit scores, the relation of debt and interest to credit, and predatory lending.	☐ Yes ☐ No ☐ Partial		
5. Uses and costs of loans, including student loans, as well as policies that provide student loan forgiveness.	☐ Yes ☐ No ☐ Partial		
6. Types and costs of insurance, including home, auto, health, and life insurance.	☐ Yes ☐ No ☐ Partial		
7. Impacts of the tax system, including its impact on personal income, the process to file taxes, and how to read tax forms and pay stubs.	☐ Yes ☐ No ☐ Partial		
8. Principles of investing and wealth building, including investment alternatives to build financial security, including tax-advantaged investments such as pensions and 401(k) plans, individual retirement accounts (IRAs), and stocks, bonds, mutual funds, and index funds.	☐ Yes ☐ No ☐ Partial		

13 Statutory Requirements	Does your curriculum address this requirement?	Supporting Details (If Partial or Additional Comments)	Sample Lesson (Attach or Link)
9. Enhancing consumer protection skills by raising awareness of common scams and frauds and preventing identity theft.	☐ Yes ☐ No ☐ Partial		
10. Identifying means to finance college, workforce education, low-cost community college options, and other career technical education pathways or apprenticeships. Financing options covered may include scholarship, merit aid, and student loans.	☐ Yes ☐ No ☐ Partial		
11. Understanding how psychology can impact one's financial well-being.	☐ Yes ☐ No ☐ Partial		
12. Charitable giving.	☐ Yes ☐ No ☐ Partial		
13. Other topics that are directly and specifically relevant to personal finance. Note: The following may ultimately be combined or may already exist within topics 1–12. • Purchasing vs leasing a vehicle • Renting vs buying a home • California Specific Financial Information (e.g. California Dream Act, Cal Grant Programs, CalKIDS, State-specific salary information)	☐ Yes ☐ No ☐ Partial		

Section 2: Curriculum Implementation Overview

Best Practices for Utilizing This Curriculum:

Possible think abouts:

- Gaining access to curriculum/resources (teacher accounts, digital classrooms, printables...?)
- Course pacing and recommended sequencing (intended to be semester, full-year, or supplemental)
- Suggested teaching methodologies (e.g., project-based learning, simulations, case studies)
- Real-world application opportunities (internships, career exploration, financial simulations)

Provide an overview of how districts and teachers can best implement your curriculum.

Differentiation Available within the Curriculum

Possible think abouts:

- What curriculum supports are available to English language learners?
- How does your curriculum foster accessibility for students with disabilities?
- How is your curriculum culturally responsive and/or designed to support culturally responsive teaching practices?

What instructional supports exist within your curriculum to meet diverse learning needs?

Section 3: Teacher Support and Professional Development

Support Type	Available? (Yes/No)	Details (Frequency, Format, Variety, Coming Soon, etc.)
Professional Development	☐ Yes ☐ No	
In-Class Support for Teachers	☐ Yes ☐ No	
Guest Speakers and Industry Experts	☐ Yes ☐ No	
Community Partnerships and Financial Sector Outreach	☐ Yes ☐ No	
Additional Online Resources and Supplemental Materials	☐ Yes ☐ No	

Section 4: Lesson Samples Highlighting Accessibility and Inclusivity Strategies

Select up to 3 lessons that highlight the following: - Strategies to ensure content is equitable and engaging for students from all backgrounds - Accommodations for students with diverse learning needs		
Lesson Description: Topic alignment, learning objectives, duration, etc.	Lesson narrative: Identify the specific high leverage teaching strategies being utilized in the chosen samples.	Link to Lesson

Section 5: Longevity and Student Support Beyond the Course

What types of financial tools, resources, or mentorship opportunities are provided to students beyond the duration of the course?
What type of post-course continuing education opportunities or pathways are available to further students' financial literacy?

Section 6: Open Comment

Is there anything else you would like to highlight that has not already been mentioned?
Do you offer curricular resources for grades other than 9-12? If so, which K-8 grade levels do you target?

If you have any questions about this document or need further assistance, please provide your questions below:

Questions: