



# LifeSkills financial literacy for primary schools:

Lessons overview and alignment to the  
Financial Education Planning Frameworks

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# Introduction

Our suite of financial literacy lesson plans for primary schools focuses on teaching pupils aged 7-11 how to form good money management habits whilst developing certain Core transferable skills. Each lesson in the suite can be delivered as a standalone session or as part of a series in the classroom or remotely.

The activities are flexible and can be adapted to suit your class. If your pupils are older or more advanced in their understanding of financial literacy you can also complete the extension tasks for more in-depth learning. Younger pupils and those less familiar with financial literacy may benefit from going at a slower pace, completing the maths elements as a group or being provided with printed resources highlighting key terminology.

If delivering the lessons as a series, we recommend starting with [Samir's birthday budget challenge](#) as it sets the scene and introduces the themes and characters that are referred to throughout the other sessions. The rest can be used flexibly and in any order.

The lessons in this suite align with the [Financial Education Planning Frameworks](#) to help you deliver financial education across your primary school curriculum for P4-7 or Years 3-6 (KS2).



# Samir's birthday budget challenge

This is a story-based [interactive activity](#) that encourages pupils to follow Samir as he spends his birthday money and to pay close attention to clues along the way to solve the mystery of the missing money.

Differentiation	Financial Education Planning Framework links
<p>Younger pupils and those less familiar with financial literacy may be unfamiliar with some of the terms used in this session. It may work better for your class to go through the activity at a slower pace to ensure everyone has a clear understanding of the scenarios Samir encounters.</p>	<ul style="list-style-type: none"> <li>• How to manage money</li> <li>• Becoming a critical consumer</li> <li>• Managing risks and emotions associated with money</li> <li>• Understanding the important role money plays in our life</li> </ul>



# Banking and budgeting basics

The [activities in this session](#) focus on supporting an understanding of basic banking vocabulary and taking income and expenditure into account by giving pupils the opportunity to create their own budgets. It includes an interactive worksheet so pupils can follow along and complete the activities while working remotely or alternatively can be printed. There is also the option to deliver the budgeting activity via a short Online lesson film.



## Differentiation

Younger pupils and those less familiar with financial literacy may need more guidance when completing the match up game in this lesson to help them understand the terminology that is being used and what it means. You could print off the presentation slides to give to pupils so they have the definitions of the different terms close by when completing the activity.

Encourage pupils to use their mental maths skills when creating their own budget. Pupils can be given calculators to make the task less challenging, and you could work as a class to calculate the answers together.

## Financial Education Planning Framework links

- How to manage money
- Managing risks and emotions associated with money

# Safe and sensible spending

This session helps pupils understand some of the ways they can keep money safe from scams with an [interactive tool](#) to help them form good money habits for the future. It also encourages young people to consider value for money when buying an item. This lesson plan contains an interactive worksheet that can be provided to pupils so they can complete the activities remotely, or it can be printed if carrying out the lesson in the classroom.



Differentiation	Financial Education Planning Framework links
<p>You may need to provide more guidance and support to younger pupils and those less familiar with financial literacy in the Spot the faker task to explain the terminology that is being used. You could print the presentation slides so pupils have the definitions in front of them when completing the activity.</p>	<ul style="list-style-type: none"> <li>• Becoming a critical consumer</li> <li>• Managing risks and emotions associated with money</li> <li>• Understanding the important role money plays in our life</li> </ul>

# Making the most of money

By showing pupils the ways that products in shops can be promoted, the [activities in this session](#) teach pupils about value for money and help them start to become critical consumers. There is also the option to deliver this session using an Online lesson film.

Differentiation	Financial Education Planning Framework links
<p>Encourage pupils to use their mental maths skills when calculating the costs of the items in the first activity. Younger pupils and those less familiar with financial literacy can be given calculators to make the task less challenging, and you could work as a class to calculate the answers together.</p>	<ul style="list-style-type: none"> <li>• Becoming a critical consumer</li> <li>• Managing risks and emotions associated with money</li> </ul>

