

## Financial Planning Challenge

### Phase 1 Grading Rubric

Team Name:

Total Point Allocation	5	4	3	2	1	0	Pts Possible
<b>Welcome and Executive Summary Concise Statement of Background and Problem</b>	Clear & concise statement of problem and background.	All relevant background and issues are stated but unclear.	A few relevant background and key issues are missing.	Only a general idea of background and problem is stated.	Background and issues are confusing and unclear.	Key Background and Issues are not stated.	5
<b>Net Worth Statement, Budget Analysis</b>	Calculations contain no errors and include excellent and concise discussion with suggested improvements.	Calculations contain no errors, but analysis, discussion and revisions could be improved.	Calculations are mostly correct but very limited discussion regarding improvements.	Calculations contain errors that significantly impact analysis.	Calculations contain major errors and no suggestions or discussion for educating clients on budget concerns.	No analysis.	5
<b>Retirement Income Analysis</b>	Calculations contain no errors and include excellent and concise discussion with suggested improvements.	Calculations contain no errors, but analysis, discussion and revisions could be improved.	Calculations are mostly correct but very limited analysis and discussion regarding retirement income concerns.	Calculations contain errors that significantly impact analysis.	Calculations contain major errors and no suggestions or discussion for educating clients on retirement income needs.	No analysis.	5
<b>Identifying and Analyzing Other Goals</b>	Calculations contain no errors and include excellent and concise discussion with suggested improvements.	Calculations contain no errors, but analysis, discussion and revisions could be improved.	Calculations are mostly correct but very limited analysis and discussion regarding improvements.	Calculations contain errors that significantly impact analysis.	Calculations contain major errors and no suggestions or discussion for educating clients on their options.	No analysis.	5
<b>Recommendations</b>	Excellent recommendations with all key issues and pros and cons addressed and detailed course of action for follow-up.	Recommendations are above average with most key issues addressed and follow-up items addressed.	Reasonable recommendations, but some issues are not addressed.	Recommendations are unclear and somewhat indecisive.	Recommendations are poorly written and unclear.	No formal recommendations.	5
<b>SWOT Analysis</b>	Analysis is thorough, specific and correct.	Analysis is above average with most key items addressed.	Most key items are addressed, but some items are not addressed.	Several key items are missing or overlooked.	Analysis is incomplete or inaccurate.	No analysis.	5

<b>Documentation</b>	All graphs, charts, figures are complete with excellent summaries.	Documentation complete but not well organized. Most figures are well summarized.	Most key issues are well documented, however some graphs, charts and figures are difficult for client to understand relevance.	Several key issues are missing documentation and/or are very limitedly documented.	Graphs, charts and figures contain errors that make the analysis inaccurate and confusing.	No supporting graphs, charts, figures, illustration, etc.	5
<b>Writing Style</b>	Writing style is easy to read, very clear, organized, complete.	Overall the writing style is very well done; no errors, but not well organized.	Report is readable with a few grammar and spelling errors, somewhat poorly organized.	Plan has several grammar or spelling errors and somewhat difficult to read.	Multiple grammar or spelling errors are present.	Plan is difficult to read, and has multiple errors.	5
<b>Organization of Financial Plan</b>	The plan is exceptionally organized and is obviously helpful to the client.	The plan is well organized and is helpful to the client.	The plan is mostly organized and somewhat helpful to the client.	The plan is inconsistently organized and causes confusion to the client.	The plan is not organized in a coherent manner and is confusing to the client	No organization is present in the plan.	5
<b>Written and Visual Creativity</b>	The plan is exceptionally creative in both written and visual components and stands out from others.	The plan is very creative in both written and visual components and leaves an above average impression.	The plan is somewhat creative in both written and visual components and leaves an average impression.	The plan is inconsistently creative throughout and leaves an average impression.	The plan displays very little creativity and leaves a below average impression.	The plan displays no creativity and leaves a below average impression.	5

**Total Points Possible: 50**