

Financial Planning Challenge
PHASE 2: CASE STUDY PRESENTATION
SCORING RUBRIC

TEAM: _____ JUDGE: _____

	4 Exemplar	3 Good	2 Fair	1 Poor	TEAM SCORE
Accessibility of language	The language used was intuitive to any client	Most of the language used was intuitive to any client	Some of the language used contained jargon that was unintuitive to most clients	Most of the language used contained jargon that was unintuitive to most clients	_____ (out of 4)
Connection between recommendations and clients' priorities/objectives	The team provided a plan that directly related to the clients' priorities and objectives	The team provided a plan that mostly related to the clients' priorities and objectives	The team provided a plan that only remotely related to the clients' priorities and objectives	The team provided a plan that did not relate to the clients' priorities and objectives	_____ (out of 4)
Rationale/Recommendations	The relevant pros and cons of the recommendations were articulated	Most of the relevant pros and cons of the recommendations were articulated	Few of the relevant pros and cons of the recommendations were articulated	None of the relevant pros and cons of the recommendations were articulated	_____ (out of 4)
Additional issues for the client to consider	The team articulated a variety of relevant issues for the client to consider	The team articulated a few relevant issues for the client to consider	The team omitted several relevant items for the client to consider	The team failed to mention any items that were relevant for the client to consider	_____ (out of 4)
Alternative courses for the client to consider	The team articulated several possible alternative courses of action for the client to consider	The team articulated some possible alternative courses of action for the client to consider	The team articulated few potential alternative courses of action for the client to consider.	The team did not articulate any alternative courses of action for the client to consider	_____ (out of 4)
Identification of the role of other professionals in helping the client reach their goals	The team identified all relevant professionals who could enable the client to reach his goals	The team identified some relevant professionals who could enable the client to reach his goals	The team identified few relevant professionals who could enable the client to reach his/her goals	The team failed to identify any relevant professionals who could enable the client to reach his goals	_____ (out of 4)
Details of advice for further action	The details of the advice were constructed to provide the client and other professionals a clear path for subsequent action	Most of the details of the advice were constructed to provide the client and other professionals a clear path for subsequent action	Some of the details of the advice were constructed to provide the client and other professionals a clear path for subsequent action	None of the details of the advice were constructed to provide the client and other professionals a clear path for subsequent action	_____ (out of 4)
Specificity of dollar amounts/percentages in plan	The team provided all of the relevant, specific amounts in each phase of the plan presentation	The team provided most of the relevant, specific amounts in each phase of the plan presentation	The team omitted several relevant, specific dollar amounts/percentages in several phases of the presentation	There was little/no specificity with regard to dollar amounts/percentages in the presentation	_____ (out of 4)
Clarity of Presentation	The team provided a presentation designed exclusively to help the client better understand the recommendations and subsequent courses of action	The team provided a presentation that, in most cases, helped the client better understand the recommendations and subsequent courses of action	There was little focus on helping the client better understand the recommendations/subsequent courses of action	There was no focus on helping the client better understand the recommendations/subsequent courses of action	_____ (out of 4)
Creativity	The team used lots of creativity in either the visual or oral presentation to help bring the recommendation's to life	The team used some creativity in either the visual or oral presentation to help bring the recommendations to life.	The team used little creativity in the visual and oral presentation to help bring the recommendations to life.	The team demonstrated no creativity in the visual or oral presentation to help bring the recommendation's to life.	_____ (out of 4)
Professionalism/Organization	The team appeared professional both in appearance as well as in organization	The team appeared professional most of the time in appearance as well as in organization	The team was inconsistent with regard to professionalism and/or organization	The team was unprofessional in appearance and/or unorganized a significant portion of the time	_____ (out of 4)

TOTAL: _____(out of 44)

Judge's Signature: _____