

Financial Planning Challenge

Phase 1 Grading Rubric

Team Name:

Total Point Allocation	5	4	3	2	1	0	Pts Possible
Executive Summary Concise Statement of Background and Problem	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
Financial Analysis - Budget Cash Outflows	Calculations of cash flow budget contains no errors and include discussion with suggested improvements	Calculations of cash flow budget contains no errors, but discussion and revisions are not complete	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
Financial Analysis - Retirement Income Cash Inflows without Annuities	Calculations of retirement income contains no errors and include excellent concise discussion with suggested improvements	Calculations of retirement income contains 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
Financial Analysis - Retirement Income Cash Inflows with Annuities	Calculations of retirement income contains no errors and include excellent concise discussion with suggested improvements	Calculations of retirement income contain no errors, but analysis, discussion and revisions with annuities could be improved	Calculations are mostly correct but very limited analysis and discussion regarding impact, pros, and cons of annuities	Calculations contain errors that significantly impact analysis	Calculations contain major errors and no suggestions or discussion for educating clients on retirement income needs or annuities.	No analysis	5
Recommendation	Excellent with all key issues and pros and cons addressed and detailed course of action for follow-up	Above average with most key issues addressed	Reasonable recommendation, but some issues are not addressed	Unclear and somewhat indecisive	Poorly written and unclear	No formal recommendation	5
Supporting Documentation	Specific, well organized, complete documentation	Documentation complete but not well organized	Most key issues are well documented	Several key issues are not well documented	Limited documentation	No documentation	5

Documentation	All graphs, charts, figures are complete with excellent summaries	Most figures are well summarized	Some graphs and charts are difficult for client to understand relevance	Very limited summaries of documentation	Graphs and figures contain errors that make the analysis inaccurate and confusing	No supporting graphs, figures, illustration, etc.	5
Writing Style	Easy to read, very clear, organized, complete	Overall very well done; no errors, but not well organized	Readable with a few grammar and spelling errors, somewhat poorly organized	Several grammar or spelling errors and somewhat difficult to read	Multiple grammar or spelling errors	Difficult to read, multiple errors	5
Report Organization	Excellent	Above average	Average	Below average	Confusing	No organization	5
Written Creativity	Exceptional creativity that stands out from others	Very creative leaving an above average impression	Some creativity, but does not make an impression above average	Below average	Very little creativity	No creativity	5

Total Points Possible: 50