Financial Planning Challenge Case Grading Rubric

Judge Name:

Team Name:

Total Point All	ocation 5 4	3 2	1 0	Points Possible			
		All relevant		Only a general			
Executive Summary	Clear & concise	background and	A few relevant	idea of	Background		
Concise Statement of	statement of	issues are	background and	background and	and issues are	Key Background	
Background and	problem and	stated but	key issues are	problem is	confusing and	and Issues are not	
Problem	background	unclear	missing	stated	unclear	stated	5
					Calculations		
	Calculations of				contain major		
	cash flow	Calculations of			errors and no		
	budget contains	cash flow budget	Calculations are		suggestions or		
	no errors and	contains no	mostly correct		discussion for		
	include	errors, but	but very limited	Calculations	educating		
Financial Analysis -	discussion with	discussion and	discussion	contain errors	clients on		
Budget Cash	suggested	revisions are not	regarding	that significantly	budget		
Outflows	improvements	complete	improvements	impact analysis	concerns.	No analysis	5
	Calculations of		Calculations are		Calculations		
	retirement	Calculations of	mostly correct		contain major		
	income contains	retirement	but very limited		errors and no		
	no errors and	income contains	analysis and		suggestions or		
	include excellent	no errors, but	discussion		discussion for		
Financial Analysis -	concise	analysis,	regarding	Calculations	educating		
Retirement Income	discussion with	discussion and	retirement	contain errors	clients on		
Cash Inflows without	suggested	revisions could	income	that significantly	retirement		
Annuities	improvements	be improved	concerns	impact analysis	income needs.	No analysis	5

Report Organization	Excellent	Above average	Average	Below average	Confusing	No organization	5
Writing Style	complete	organized	organized	difficult to read	spelling errors	multiple errors	5
	Easy to read, very clear, organized,	Overall very well done; no errors, but not well	few grammar and spelling errors, somewhat poorly	Several grammar or spelling errors and somewhat	Multiple grammar or	Difficult to read,	_
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 Readable with a	Very limited summaries of documentation	Graphs and figures contain errors that make the analysis inaccurate and confusing	No supporting graphs, figures, illustration, etc.	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
Recommendation	Excellent with all key issues and all 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
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

			Some creativity,					1
	Exceptional	Very creative	but does not					
	creativity that	leaving an	make an					
	stands out from	above average	impression		Very little			
Written Creativity	others	impression	above average	Below average	creativity	No creativity	Ę	;

Total Points: