

**Financial Planning Challenge**  
**PHASE 2: CASE STUDY PRESENTATION**  
**SCORING RUBRIC**

TEAM: \_\_\_\_\_ JUDGE: \_\_\_\_\_

|                                                                                                  | 4<br>Exemplar                                                                                                                                   | 3<br>Good                                                                                                                                      | 2<br>Fair                                                                                                                           | 1<br>Poor                                                                                                                           | TEAM SCORE       |
|--------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|------------------|
| <b>Accessibility of language</b>                                                                 | 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) |
| <b>Connection between recommendations and clients' priorities/objectives</b>                     | 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) |
| <b>Rationale/Recommendations</b>                                                                 | 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) |
| <b>Additional issues for the client to consider</b>                                              | 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) |
| <b>Alternative courses for the client to consider</b>                                            | 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) |
| <b>Identification of the role of other professionals in helping the client reach their goals</b> | 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) |
| <b>Details of advice for further action</b>                                                      | 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) |
| <b>Specificity of dollar amounts/percentages in plan</b>                                         | 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) |
| <b>Clarity of Presentation</b>                                                                   | 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) |
| <b>Creativity</b>                                                                                | 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) |
| <b>Professionalism/Organization</b>                                                              | 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: \_\_\_\_\_