

Name: _____

Financial Plan Rubric

	Exceptional (8 to 10 points)	Acceptable (3 to 7 points)	Minimum Effort (0 to 2 points)	Points Earned
Cover Page	Contains graphic/illustration, name of project, your name, class hour; creativity is evident	Contains name of project, your name, class hour	Contains some of the following: name of project, your name, class hour	
Table of Contents	Heading, sections clearly labeled with leaders and page numbers	Heading, sections labeled with page numbers	Missing sections, not clear	
Career Planning	Describe life situation providing details related to marital status, children, occupation, and income. Investigate career. Determine annual salary. If married, provide spouse's salary.	Describe life situation providing details related to marital status, children, occupation, and income. Provide annual salary.	Identify marital status, children, occupation, and income.	
Financial Goals	Clearly written; contains at least two short-term financial goals and three long-term financial goals	Clearly written; contains at least one short-term goals and two short-term goals	Goals are not clearly written, contains only one short-term and one long-term financial goal	
Banking Services	Well written, clearly explains services provided at various institutions (at least two), materials provided (from at least one), institution and services you will use are identified, justification is provided for choice of institution and services	Well written, clearly explains services provided at various institutions (at least one), institution and services you will use are identified, justification is provided for choice of institution and services	Well written, explains services provided at institution you will use, identifies services you will use	
Housing Decision	Information and materials provided on investigation of housing options available, choice is explained in detail, sources of credit are explained and your selection is identified and explained in detail, monthly expenses related to your decisions are provided	Information provided on investigation of housing options available, choice is explained in detail, sources of credit are explained and your selection is identified and explained in detail, monthly expenses related to your decisions are provided	Housing options available are identified, choice is explained, sources of credit and your selection are identified, monthly expenses related to your decisions are provided	
Automobile	Information and materials provided on investigation of auto options available, choice is explained in detail, sources of	Information provided on investigation of auto options available, choice is explained in detail, sources of credit	Auto options available are identified, choice is explained, sources of credit and your	

	credit are explained and your selection is identified and explained in detail, monthly expenses related to your decisions are provided	are explained and your selection is identified and explained in detail, monthly expenses related to your decisions are provided	selection are identified, monthly expenses related to your decisions are provided	
Insurance	Detailed description of types of insurance you need, materials provided, explanation of types and providers and why you made these choices, monthly expense related to your decisions are provided	Description of types of insurance you need, explanation of types and providers and why you made these choices, monthly expense related to your decisions are provided	Identify types of insurance you need, explain types and providers, monthly expense related to your decisions are provided	
Monthly Budget	Detailed monthly budget which includes income and expenses detailed explanation of whether the budget will allow you to meet your financial goals (see above), explanation as to whether or not you had to make changes to have a zero or positive balance	Detailed monthly budget which includes income and expenses, detailed explanation of whether budget will allow you to meet your financial goals (see above)	Monthly budget which includes income and expenses, explanation of whether budget will allow you to meet your financial goals (see above)	
POINTS EARNED:				
Possible 90				