Name: _____

Financial Plan Rubric

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



| | Possible 90 | | |
|-----------|--|---------------------------------------|------------------------------------|
| | | 1 | POINTS EARNED: |
| | balance | | |
| | explanation as to whether or not you had to make changes to have a zero or positive | financial goals (see above) | above) |
| | meet your financial goals (see above), | budget will allow you to meet your | to meet your financial goals (see |
| | of whether the budget will allow you to | detailed explanation of whether | of whether budget will allow you |
| Budget | income and expenses detailed explanation | includes income and expenses, | income and expenses, explanation |
| Monthly | Detailed monthly budget which includes | Detailed monthly budget which | Monthly budget which includes |
| | your decisions are provided | your decisions are provided | |
| | these choices, monthly expense related to | choices, monthly expense related to | decisions are provided |
| | of types and providers and why you made | providers and why you made these | monthly expense related to your |
| | you need, materials provided, explanation | need, explanation of types and | need, explain types and providers, |
| Insurance | Detailed description of types of insurance | Description of types of insurance you | Identify types of insurance you |
| | provided | decisions are provided | |
| | expenses related to your decisions are | monthly expenses related to your | are provided |
| | identified and explained in detail, monthly | identified and explained in detail, | expenses related to your decisions |
| | credit are explained and your selection is | are explained and your selection is | selection are identified, monthly |

