

Letter of Advice for the Brown Family Rubric

	Total Points Earned
24	Total Points Possible
	Percentage

Name _____

Date _____

Class _____

Directions: The Brown family has asked that as their financial advisor you write them a letter addressing the following questions:

1. Why it is important for us to develop and maintain a spending plan?
2. We don't know how to develop a spending plan. Would you explain exactly how you developed our spending plan so we can repeat the process?
3. What changes did you make to our January Income and Expense Statement in order to develop our February spending plan? Please make sure to explain why you made each change.
4. Our goals needed to be more specific after creating our spending plan. What do you think our new, more specific goals should be?
5. What control system do you recommend we utilize and why?
6. We want to evaluate our spending plan from month to month and ensure it continues to work for us. Do you have any advice for us regarding how to best do this? (offer at least one piece of advice)

	Exemplary	Satisfactory	Unsatisfactory	No Performance	Score
Content: <ul style="list-style-type: none"> ▪ All six reflective questions are addressed ▪ Answers are accurate 	12-9	8-5	4-1	0	
Writing Skills: <ul style="list-style-type: none"> ▪ Sentences are fluent and effective ▪ Very few errors in mechanics, punctuation and word choice ▪ Letter includes an introduction, body, and conclusion 	6-5	4-3	2-1	0	
Effectiveness of Presentation: <ul style="list-style-type: none"> ▪ Clearly prepared ▪ Easily read and neatly assembled ▪ Minimum of one-page, double-spaced with 12 font and 1-inch margins. 	6-5	4-3	2-1	0	
				Total Points Earned	
				Total Points Available	24
				Percentage	