Chapter 17 Retirement and Estate Planning

Discovery Project Evaluation Rubric

Directions Use the Self-Evaluation Guidelines below to assess the content of your Discovery Project. Rate your performance and give yourself a score for each criterion. Then give your answers and this completed Evaluation Rubric to your teacher to evaluate.

Self-Evaluation Guidelines

Exemplary (10–8 points)	Satisfactory (7–4 points)	Poor (3–0 points)
• Includes all of the required content elements • Very well organized • All details provided • Logical conclusions supported by research • Presentation of findings extremely effective and/or appropriate	• Includes some of the required content elements • Well organized • Many general details provided • Conclusions somewhat logical and somewhat supported by research • Presentation of findings somewhat effective and/or appropriate	• Includes few or none of the required content elements • Disorganized • Few or no details provided • Conclusions illogical and not supported by research • Presentation of findings ineffective and/or inappropriate

Criteria	Exemplary (10–8 points)	Satisfactory (7–4 points)	Poor (3–0 points)	Student Score	Teacher Score
Content					
Analysis/explanation of retirement planning					
Evaluation of future living expenses and sources of income					
Evaluation of future assets and liabilities					
Analysis/explanation of life insurance and annuities					
Analysis/explanation of personal retirement accounts					
Analysis/explanation of employer pension plans					
Thoroughness and logic of financial analysis					
Understanding of retirement savings options					
Understanding of importance of retirement planning					
Total					