

Task Rubric – A Financial Report

Expectations*	Criteria	Level 1	Level 2	Level 3	Level 4
Knowledge/Understanding					
The student:					
1	– generates accurate calculations in the financial report (calculations showing understanding of such concepts as compound interest, amortization period, geometric sequence, exponential growth, mortgage)	– generates calculations with limited accuracy	– generates calculations with some accuracy	– generates calculations with considerable accuracy	– generates calculations with a high degree of accuracy
Thinking/Inquiry/Problem Solving					
The student:					
2	– provides a detailed analysis of the client's financial situation	– provides an analysis of the client's financial situation with limited detail	– provides an analysis of the client's financial situation with some detail	– provides an analysis of the client's financial situation with considerable detail	– provides an analysis of the client's financial situation with a high degree of detail
1	– recommends a down payment for the client and justifies it effectively	– recommends a down payment and justifies it with limited effectiveness	– recommends a down payment and justifies it with some effectiveness	– recommends a down payment and justifies it with considerable effectiveness	– recommends a down payment and justifies it with a high degree of effectiveness
3	– accurately analyses various mortgage options	– analyses various mortgage options with limited accuracy	– analyses various mortgage options with some accuracy	– analyses various mortgage options with considerable accuracy	– analyses various mortgage options with a high degree of accuracy

(continued)

Expectations*	Criteria	Level 1	Level 2	Level 3	Level 4
Communication					
	The student:				
5	– effectively integrates narrative and mathematical forms in the financial report	– integrates narrative and mathematical forms with limited effectiveness	– integrates narrative and mathematical forms with some effectiveness	– integrates narrative and mathematical forms with considerable effectiveness	– integrates narrative and mathematical forms with a high degree of effectiveness
6	– effectively communicates information to the client in mathematical language	– communicates information in mathematical language with limited effectiveness	– communicates information in mathematical language with some effectiveness	– communicates information in mathematical language with considerable effectiveness	– communicates information in mathematical language with a high degree of effectiveness
Application					
	The student:				
4	– recommends a mortgage for the client and justifies it clearly and effectively	– recommends a mortgage and justifies it with limited clarity and effectiveness	– recommends a mortgage and justifies it with some clarity and effectiveness	– recommends a mortgage and justifies it with considerable clarity and effectiveness	– recommends a mortgage and justifies it with a high degree of clarity and effectiveness

*The expectations that correspond to the numbers given in this chart are listed on page 8.

Note: A student whose overall achievement at the end of a course is below level 1 (that is, below 50%) will not obtain a credit for the course.