

Sample Assignment | Financial Acumen II

Purpose:

This document provides an example assignment for a financial acumen competency.

M1.L1.T3 SMART Financial Goals Draft 1 Assignment

This assignment is your first opportunity to practice writing SMART goals for this course. Before you begin, be sure you are familiar with the concept of SMART goals and the format for writing them. To review, refer to Module 1, Lesson 1, Topic 3 (M1.L1.T3). [ID note: Link M1.L1.T3 to the lesson] You will need to save your work and the feedback you receive to help with your next SMART goals assignment. [...] The rubric for this assignment is worth a total of 15 points. A 90% score is required to advance. To achieve 90%, you need to score 14 out of 15 or better.

Assignment Steps:

1. Choose one (1) category from this list and create three (3) SMART goals for that category, using this template: : career planning and development, spending plan/cash flow analysis, tax planning, savings and investing, and use of credit.
2. For each goal, identify and explain the reason that goal is important to you at this time. Each SMART goal area should be documented with one or two sentences. Each goal should have all of these attributes: Specific, Measurable, Achievable, Relevant, and Time-bound (SMART). For a review of SMART goals, refer to M1.L1. [ID Note: link M1.L1 to the lesson]
3. Write your goals and [cite your sources in APA style](#) or use an informal format as described by Wharton School of Business here: [Informal business communication citation](#).
4. Review the grading rubric before finalizing your document.
5. Save the document in MS Word or PDF format before uploading.
6. Submit your assignment.

Later, review and apply all helpful feedback you receive before you begin work on the next SMART goals assignment.