



Sample Assignment | Financial Acumen II

Purpose:

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

M3.L2 SMART Financial Goals Draft 2 Assignment

Assignment Overview:

Before you begin this assignment, review your work and feedback from the Financial Goals Draft Assignment you completed in Module 1, Lesson 1. You may transfer the goals you created for the draft SMART goals assignment or choose to create new goals for this assignment. It may help to review the concept of SMART goals and the format for writing them. To review, refer to Module 1, Lesson 1, Topic 3 (M1.L1.T3). In this assignment you will create fifteen (15) SMART goals.

[...]

The rubric for this assignment is worth a total of 24 points. A 90% score is required to advance. To achieve 90%, you will need to score 22 out of 24 or better by achieving “Highly Developed” or “Developed” for each criterion. Any criterion with a “Not Yet Developed” score, even with an overall score of 22 out of 24, does not meet the standard required for passing.

Assignment Steps:

1. Using this template, submit three SMART goals in each of the 5 areas for a total of 15 goals: 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 Module 1 Lesson 1. [ID Note: link M1.L1 to the lesson]

3. Write your goals and, if you have references, [cite sources in APA style](#) or use an informal format as described by Wharton School of Business here: [Informal business communication citation](#).
4. The overall length of this assignment should be two to three (2 – 3) pages explaining your 15 goals, each of which has all five attributes of a SMART goal.
5. Review the grading rubric before finalizing your document.
6. Save the document in MS Word or PDF format and submit your assignment.