

Student's Name:	Sem:	Course #:	CRN #:
Instructor:			

BFN 203 – Investment Principles: Simulation Investment Management Project

Performance Competency: Documented achievement (see legend below)	3 ✓ Mastery	2 ✓ Proficient	1 ✓ Developing	0 ✓ Novice
Introduction: Clearly identified the subject matter				
Introduction clearly identified the assumptions and goals of the investment management strategy created.				
Introduction expressed thoughts logically and sequentially.				
Introduction was 2-3 slides in length in a PPT or similar visual format.				
Body: Applied analytical and complex reasoning skills from the investment management principles learned in the course and through independent research calculated and delivered an accurate quantitative analysis of the projected results of your investment management strategy.				
Acquired data from calculations and independently researched sources to: Delivered an executive summary of the quantitative results of your investment management strategies for the project goals that cites assumptions and illustrations/schedules/calculations presented in a PPT presentation or similar visual presentation.				
Expressed clearly how the researched quantitative data reviewed should be considered from a qualitative perspective to aid in the investment management strategy decisions. Expressed clearly a focused educational deliverable that informed about specific aspects of the management plan.				
Synthesized in your own words the investment management plan regarding the project goals and reviewed clearly the quantitative results of the plan that was 9-12 slides in presentation length.				
Conclusion: Delivered qualitative reasoning for the decisions developed in your investment management plan.				
Stated the main qualitative reasons for the decisions made in the plan in no more than 4-5 slides in a PPT or a similar visual format.				
Supported thoughts using cited financial planning data or cited financial planning expert opinions.				
Conclusion expressed thoughts logically and sequentially				
Add Points:				
Total Pts.:				
Performance Level Achieved (see legend below)				

Points	Performance Levels
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	27-24 = Mastery, 23-18= Proficient, 17-9 = Developing, 8-0 = Novice
3 Pts.	Mastery – Able to clearly articulate the concepts with little or no guidance
2 Pts.	Proficient – Able to clearly articulate the concepts with minimal guidance
1 Pt.	Developing – Has little to no understanding of the concept
0 Pts.	Novice – Unable to articulate concept(s)