

RSP Board Member – Case Study Grading Guidelines

Complete your assessment using the criteria set forth below. Please maintain complete confidentiality of everything involved in your grading duties. Some of the case studies may involve actual settlements and we owe confidentiality to the submitter as well. Do not make copies of the submitted plan and any copies (electronic or paper) not returned to me should be destroyed after your review. Make any necessary comments directly on the originally submitted plan document and return it with this grading sheet in the envelope provided. Ideally, these documents should be returned within two days of receipt.

Criteria	Points Available	Points Earned
A. Comprehensiveness	10 points total	
<ul style="list-style-type: none"> • Comprehensive Nature of Case <ul style="list-style-type: none"> ○ Must address at least 3 areas of settlement planning (structured settlements, trusts, entitlement planning, estate planning, insurance, college funding, employee benefits, investments, etc.) 	10	
B. Description of Case and Assessment of Issues	20 points total	
<ul style="list-style-type: none"> • Statement of facts surrounding the case 	10	
<ul style="list-style-type: none"> • Assessment and prioritization of client goals 	10	
C. Strength of analysis and recommendations	60 points total	
<ul style="list-style-type: none"> • Recognition of critical issues 	20	
<ul style="list-style-type: none"> • Appropriateness of recommendations based on issues presented 	20	
<ul style="list-style-type: none"> • Proper justification of recommendations 	10	
<ul style="list-style-type: none"> • Thoroughness of analysis 	10	
C. Formatting and Presentation	10 points total	
<ul style="list-style-type: none"> • Professionalism <ul style="list-style-type: none"> ○ Plan should demonstrate attention to detail including spelling and grammar 	5	
<ul style="list-style-type: none"> • Format <ul style="list-style-type: none"> ○ Plan should be formatted in an easy to follow, labeled arrangement 	5	
Total	100	

Do you believe this case study should receive a grade of pass based on the criteria set forth above *and* upon your professional opinion?

Yes

No