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| **Criteria** | **Developing** | **Adequate** | **Accomplished** |
| **Financial plan identifies sources of financial aid** | Financial plan identifies one source of financial aid. The procedure for applying to the source may be described. | Financial plan identifies at least one to three sources of financial aid. The procedures for applying to each source are described. | Financial plan identifies at least one to three sources of financial aid. The procedures for applying to each source are clearly described in detail. |
| **Financial plan matches savings goals with saving needs** | Financial plan goals do not match needs. There is no explanation provided. | Financial plan goals match needs. The explanation provided is somewhat clear. | Financial plan goals match needs. The explanation provided is clear. |
| **Financial plan discusses approaches to meeting gaps in savings** | The financial plan does not discuss an approach to meeting gaps. | The financial plan discusses one approach to meeting gaps. | The financial plan discusses several approaches to meeting gaps. |
| **Financial plan is clearly written** | The financial plan contains spelling and grammar errors that result in unclear communication. | The financial plan may contain some spelling and grammar errors that do not impact communication significantly. | The financial plan is clearly written. |