



Personal Finance Case Study Rules & Procedures

In the Arizona Personal Finance Case Study teams demonstrate high levels of personal finance skills. Financial planning is a comprehensive analysis of needs, wants, and goals unique to clients. You and your team will create a fictional financial planning company that provides comprehensive financial planning for your clients. Teams will receive a fictional case study prior to competition day and create a financial plan to be presented on competition day.

Registration

- [Register](#) for the competition no later than March 10, 2024.

Procedure

1. Teams of 3 - 4 students attending the same school form a fictional financial planning company. Create the following for your company:
 - Company name
 - Company mission
 - Company logo
2. Working together, students review the financial situation and goals of the family.
3. Develop a financial plan that addresses all financial goals mentioned in the case study.
4. The financial plan for the family should include, but is not limited to, recommendations in these areas of change:
 - Earnings
 - Spending
 - Health care and other insurance coverage
 - Saving for post-secondary education
 - Retirement planning
 - Financial plans can include revised family budgets, expense sheets, and anything else you feel supports your plan.
5. Create a presentation that represents your company and the completed financial plan.

Rules

- Teams will present their financial plans in the first round of competition via Zoom on **April 2nd or 3rd**.
- Teams will be placed in a judging Zoom room for the presentation.
- The presentation cannot last more than 15 minutes, and all group members must participate.
- The presentation will be followed by judges' questions to last no more than 5 minutes.
- Finalists will be invited to compete in the State Finals to take place on **April 19th at Mesa Community College**
- On state final competition day, presentations will be presented to judges in their assigned presentation room at Mesa Community College.

Scoring

Teams will be evaluated and scored in the following areas:

- The plan addresses the financial goals of the family.
- Financial planning tools and concepts are used accurately.
- The overall quality of the presentation.

The team with the highest total score across these areas will be declared the winner.

Arizona Personal Finance Challenge Champion and National Personal Finance Challenge Qualifier

The High School team with the highest combined scores from BOTH the Personal Finance Challenge and the Personal Finance Case Study competition will be named State Champions and will qualify for the National Personal Finance Challenge.