

NAME: _____

DATE: _____

CASE STUDY

Case Study Advisory Challenge

What + Why: Use case study evidence to explain how the way your assigned person earns and what they take home in pay influence the financial trade-offs they face.

You have seen the pay stubs and financial snapshots for all five classmates. Now your group will look closely at one person and answer **Supporting Question 1** using evidence.

Supporting Materials:

Profiles, Financial Snapshots, and Pay Stubs (Case Study)

Pay Stubs and Profiles chart (completed previously)

Instructions:

1. Review the **Profile, Financial Snapshot, Pay Stub**, and completed **Pay Stubs and Profiles** chart for your specific case study profile.
2. Answer **Supporting Question 1** for that person.
3. Use evidence when answering **Supporting Question 1** by filling in the Advisory Challenge table provided.
4. Prepare a brief explanation to share with another group.

Advisory Challenge

Our Case Study Profile:

Supporting Question 1: How does the way my person earns and what they take home in pay influence the financial trade-offs they face?

How they earn	
Take-home pay	
Trade-off they face	
Evidence	

Rubric

Criteria	4 – Strong	3 – Proficient	2 – Developing	1 – Beginning
Supporting Question Response	Clearly and precisely explains how the person earns money and their approximate take-home pay, including pay frequency and deduction impact	Clearly explains how the person earns money and their approximate take-home pay	Addresses earning or take-home pay but not both, or does so without clarity	Does not address how the person earns money or what they take home in pay
Trade-Off Explanation	Explains trade-off with nuance, connecting income type, take-home pay, and personal values, goals, or circumstances	Identifies and explains one trade-off connected to income type and take-home pay	Trade-off is named but not connected to how the person earns or what they take home	No trade-off identified, or trade-off is unrelated to income type or take-home pay
Use of Evidence	Uses precise, well-chosen evidence from multiple case study materials that strongly supports the response	Uses specific evidence from at least two case study materials to support the response	Some evidence referenced but not clearly connected to the response	No evidence from case study materials used
Clarity and Reasoning	Response is compelling, well-organized, and demonstrates strong financial reasoning throughout	Response is clear, focused, and uses reasoning rather than assumptions or judgment	Response is partially clear but reasoning is inconsistent or unsupported	Response is unclear, incomplete, or relies on assumptions about the person