

Griffith Business School
Department of Accounting Finance and Economics

3108AFE Taxation Planning

MARKING CRITERIA SHEET – CLIENT INTERVIEW

Weighting - 5%

Student Name - _____

Student Number - _____

Mark Awarded:	/ 5
----------------------	------------

Client Interview (note the student is the advisor)						
Student attended a 10 minute interview with the 'client' to obtain further appropriate information.						
Advisor had appropriate greeting.	0	1	2	3	4	5
Advisor listened to client.	0	1	2	3	4	5
Advisor was professional in his/her conduct.	0	2	4	6	8	10
The client understood what the advisor was saying and why it was important.	0	1	2	3	4	5
The advisor requested relevant further information from the client (<i>consider online question and explanation provided</i>)	0	4	8	12	16	20
Advisor accurately summarised the client's situation. (ie active listening)	0	2	4	6	8	10
Advisor answered questions knowledgably	0	2	4	6	8	10
Advisor explained topics clearly (including explaining difficult concepts)	0	2	4	6	8	10
Advisor responded appropriately when did not know an answer	0	2	4	6	8	10
Advisor took notes during meeting	0	1	2	3	4	5
Prior email to meeting asking for document and confirm meeting	0	1	2	3	4	5
The client felt confident with the advisor dealing with their matter.	0	1	2	3	4	5
TOTAL (out of 100)						

General comments from marker ('client')
--
