**Annual Financial Management Assessment**

|  |  |  |
| --- | --- | --- |
| **Name:**  | **DDS#:**  | **Date:** |

**On the table below, please indicate the level of prompting needed for the individual to complete each task. Any tasks marked “N/A” require an explanation in the Comments column. Use the bottom two (blank) rows for any special circumstances or skills unique to the individual.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Independent** | **Verbal Prompting** | **Gestural Prompting** | **Physical Prompting** | **Unable to complete at any prompt level** | **N/A** | **Comments** |
|  |  |  |  |  |  |  |  |
| * **Recognize that money has value**
 | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |
| * **Identify the relative value of bills**
 | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |
| * **Identify the relative value of coins**
 | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |
| * **Demonstrate an interest and preference in making purchases**
 | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |
| * **Safely carry up to $\_\_\_\_\_\_\_\_ in a wallet, purse or pocket?**
 | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |
| * **Complete a transaction in the community**
 | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |
| * **Identify if he/she has received correct change**
 | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |
| * **Complete a weekly or monthly budget**
 | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |
| * **Safely maintain money at home (in a safe or lockbox)?**
 | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |
| * **Save for a future purchase**
 | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |
| * **Pay bills by mail or online?**
 | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |
| * **Avoid financial exploitation (ie: not loaning money to staff or peers)?**
 | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |
| * **Maintain a personal savings/checking account?**
 | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |
| * **Make a bank transaction?**
 | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |
| * **Carry and safely utilize an ATM card?**
 | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |
|  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |
|  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  | **[ ]**  |  |

**Assessment completed by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**