**Annual Financial Management Assessment**

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| **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?** |  |  |  |  |  |  |  |
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**Assessment completed by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**