Money Management Assessment

Individual: _____ Date: _____

Yes /No or Prompt Level

1. Understands the concept of money — that it's exchanged for desired items _____
2. Demonstrates an interest in purchasing desired items _____
3. Demonstrates an interest/ability to hold money to make purchase _____
4. Responds in someway, i.e. vocally, with gestures, physically, to indicate a desired purchase _____
5. Recognizes the difference between the value of coins and paper money _____
6. Recognizes the various coin and paper money denominations _____
7. Aware that they are to receive change and what the amount of change is _____
8. Able to do simple budgeting _____

Conclusion: _____ is capable / is not capable of handling money.
Individual's Name **(circle one)**

The team reached this decision based on: _____

_____

_____

_____

_____

_____

_____

_____

Based on the assessment, the individual can handle the following amount of cash:

Amount $ _____

Based on individual spending needs, the individual will have access to this amount of cash at the frequency recommended by the team:

Frequency _____
(i.e. Weekly, upon request, daily, monthly, etc.)

Completed by: _____
Signature/Title/Date

Prompt Level Codes I = Independent GP = Gestural Prompts VP = Verbal Prompts P = Physical Prompts HOH = Hand over hand * = lack of interest or beyond cognitive potential to learn