

# 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 some way, 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** I = Independent      GP = Gestural Prompts      VP = Verbal Prompts  
**Codes**      P = Physical Prompts      HOH = Hand over hand      \* = lack of interest or beyond cognitive potential to learn