

FINANCIAL ASSESSMENT

Project Assignment given by Kurt LaRose, MSW, LCSW

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Date _____

Name _____

INCOME	1. Avg. Monthly	2. This Month	3. Next Month
Employment			
Employment			
SS SSI			
Annuity/Invest			
Food Stamps			
Child Support			
Other			
Other			
TL INCOME	0	0	0

EXPENSES	1. Avg. Monthly	2. This Month	3. Next Month
Housing			
Lot Rent			
Propane			
Utilities			
Phone			
Cell Phone			
Cable			
Child Care			
Child Support			
Trans/Bus			
Car Payment			
Car Insurance			
Gasoline			
Addtl Insurance			
Medical (RX)			
Medical (OTC)			
Furniture			
Electronics			
Credit Card			
Other Loans			
Laundry			
Clothes			
Food			
Toiletries			
Entertainment			
Extra Expenses			
Other			
TL EXPENSE	0	0	0

BALANCE	+ / - \$0.00	+ / - \$0.00	+ / - \$0.00
BUDGET NEEDS:	HOURS X	/ HR X 4 WEEKS =	TO BALANCE AVERAGED

NOTE: If this form doesn't open for you in Excel (user ready), it maybe a problem with Skydrive, the Office Web App, or how it has been stored in "the cloud."
[NO WORRIES! Click here and it'll open as an adobe form \(ready to use\)!](#)

DIRECTIONS:

1) Enter information in "Avg. Monthly" that reflects your average income and expenses on any given month - AS YOU BELIEVE THEY OCCUR.

Income = green Expenses = red

2) Enter information in "This Month" that reflects what you can track in your account(s) and expenses that are realistic, in the event reductions/increases can be included for the future. "This month" might reflect the ideal budget if you could pay off a bill or increase income. Income is listed in green; expenses in red.

3) Enter information in "Next Month" that reflects an ideal situation - REALISTICALLY. The realistic "next month" column should include increases in expenses / income.

4) Do not enter any information in the solid grey boxes where "TL INCOME" is listed, where "TL EXPENSES" is listed, or where "BALANCE +/-" Is listed. These are auto calculated.

5) The goal of this Financial Evaluation task is to look at where things are at financially and to see what changes MIGHT BE POSSIBLE. Many couples argue over these kinds of discussions. You are asked to be honest, forthright, and accurate; nothing has to be decided for certain for the future; but for this assignment to be most effective "Avg Monthly" must reflect the true & literal income and expenses that normally occur in your lives.

6) If you make a mistake you may hit "ctrl z" for each typo, and the error will be corrected up to the last 20-30 (or possibly more) typos.

7) Print it (optional). Save it (optional). And bring the completed (the goal) evaluation with you to your next appointment.

CONFIDENTIALITY NOTE: If you complete this form on a public computer and/or if the form is saved on any PC after your complete it, please know that the information may not remain confidential. If you would prefer to complete this form manually, simply hit "print" and the form can be completed with pen and ink.

Often financial arguments lead to questions about healthy decisions, healthy boundaries, etc.

[For more information on Boundaries, click here.](#)

[For more information on Arguing and Conflicts click here.](#)