Client Name: ______________________________________

Assessment Date: ______________

(See the CFPB Financial Well-Being Scale and the UW Financial Capability Scale forms for the first 5 sections.)

BANKING INFORMATION

Do you presently have a checking account with a bank or a credit union?  □ Yes*  □ No**

*If yes, do you bounce checks frequently (at least once a month for the past 3 months)?  □ Yes  □ No

If no, have you ever had a checking account?  □ Yes  □ No

**If no, what is the main reason for not having one?

□ In ChexSystems
□ Transactions take too long
□ Not sure how to set one up
□ Fees too high
□ Don’t like dealing with bank personnel
□ Not enough money to make account useful
□ Other

Do you presently have a savings account with a bank or a credit union?  □ Yes  □ No

Notes:

______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

FFT™ Financial Health Assessment (Baseline Profile)
(Required elements are underlined.)

FFT™ is a registered mark of, and FFT™ templates are proprietary to, Local initiatives Support Corporation. FFT™ includes certain methodology that is confidential and proprietary to Project Match-Families in Transition Association, including specifically the method by which one-time outcomes and over-time outcomes are distinguished, tracked, and entered (including, without limitation, the usage of the status codes such as “beginning”, “interim”, and “end” or terms that embody similar concepts). You may not disseminate information pertaining to FFT™ or any component thereof (including without limitation third party methodologies) to unauthorized individuals nor embody any component of the FFT™ templates in any products or exploit the same in any way.”

© Local Initiatives Support Corporation 2012. This work is protected by United States copyright law. Apart from any use as permitted by the U.S. Copyright Act, no part of this document may be reproduced, distributed, transmitted, or published without the express written permission of Local Initiatives Support Corporation. You may not alter or remove any copyright notice or proprietary legend contained in or on this document.

Local Initiatives Support Corporation does not guarantee the accuracy, completeness, or usefulness of any content in this document or its fitness for any particular purpose.