

Financial Literacy

All applicants are required complete a budget with Caseworker. Those requesting Short-term or Contingency, need to view the Financial Literacy video.

Applicant reviewed the Financial Literacy discussion sheet with Caseworker: ☐ Yes ☐ No

BUDGET WORKSHEET

Budget Period:

CURRENT: One Month Prior to Application From: _____ To: _____ (Today's date)

PROJECTED: One Month Past Application From: _____ (Today's date) To: _____

INCOME/RESOURCES			EXPENSES		
	Past 30 Days	Next 30 Days		Past 30 Days	Next 30 Days
Employment			Rent/Mortgage		
Employment			Home Insurance		
Employment			Phone/Cell		
Child Support			Electric		
Social Security			Gas/Propane/Fuel/Oil		
SSI			Water		
OWF			Trash		
Food Stamps			Cable/Satellite		
Unemployment			Car Payment		
Workers Comp			Car Insurance		
VA			Gasoline/Oil		
Savings/Checking			Laundry		
CDs			Food (in addition to Food Stamp Allotment)		
Mutual Funds			Credit Card(s)		
Stocks/Bonds			Daycare/Sitter		
Other _____			Rent to Own		
Other _____			Medical		
Other _____			Clothing		
Other _____			Other: Crisis Cost/Unexpected Costs		
TOTAL INCOME	\$ 0.00	\$ 0.00	TOTAL EXPENSES	\$ 0.00	\$ 0.00

CURRENT INCOME:

TOTAL INCOME: \$ \$ 0.00

- TOTAL EXPENSES: \$ \$ 0.00

= Net Remaining \$ \$ 0.00

Crisis Confirmed? ☐ Yes ☐ No

Caseworker Initials _____

PROJECTED INCOME:

TOTAL INCOME: \$ \$ 0.00

- TOTAL EXPENSES: \$ \$ 0.00

= Net Remaining \$ \$ 0.00

Can client maintain? ☐ Yes ☐ No

Caseworker Initials _____