

Savings+ Accounts Evaluation

**Based off the Center for Financial Services Innovation's four components and eight indicators of financial health. Report can be found [here](#).*

Pre-Evaluation Form

Date: _____

Client Name: _____

Client's reason for enrolling in Savings+ Accounts (check all that apply):

Purchase a Home Improve Financial Health Improve Credit Start Saving Regularly New Job

	Needs Significant Improvement	Poor	Average	Good	Extremely Healthy
SPEND					
1. Spend less than income	1	2	3	4	5
2. Pay bills on time and in full	1	2	3	4	5
SAVE					
3. Have sufficient liquid savings	1	2	3	4	5
4. Have sufficient long-term savings or assets	1	2	3	4	5
BORROW					
5. Have a sustainable debt load	1	2	3	4	5
6. Have a prime credit score	1	2	3	4	5
PLAN					
7. Have appropriate insurance	1	2	3	4	5
8. Plan ahead for expenses	1	2	3	4	5
Total Financial Health Score: _____					

Post-Evaluation Form

Date: _____

Client Name: _____

	Needs Significant Improvement	Poor	Average	Good	Extremely Healthy
SPEND					
9. Spend less than income	1	2	3	4	5
10. Pay bills on time and in full	1	2	3	4	5
SAVE					
11. Have sufficient liquid savings	1	2	3	4	5
12. Have sufficient long-term savings or assets	1	2	3	4	5
BORROW					
13. Have a sustainable debt load	1	2	3	4	5
14. Have a prime credit score	1	2	3	4	5
PLAN					
15. Have appropriate insurance	1	2	3	4	5
16. Plan ahead for expenses	1	2	3	4	5
Total Financial Health Score: _____					

Pre-Evaluation Financial Health Score: _____

Post-Evaluation Financial Health Score: _____

Notes:
