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STAGE 3 — CHAPTER 1

Setting up your finance systems • Worksheet 1

Create a financial skills profile

Use this worksheet to identify which aspects of your money you are confident to manage independently and in which areas you require support.

Note: Financial skills are often an area where we have 'blind spots', so discussing these questions with a trusted member of your support team can add a valuable perspective.

STEP 1

Consider the ways you currently manage your finances. Think about:

- » How have things gone for you in the past?
- » In what areas do you need support?
- » Are there any systems or rules you currently have in place that enable you to manage your money more independently?

STEP 2

In collaboration with your support team, decide if the financial skills listed below are things you can do independently, with some help, or with a lot of help. Circle the corresponding box in each row.

	<i>I can do this... (circle one for each row)</i>		
Understanding how money works and how much things cost	<i>Independently</i>	<i>With some help</i>	<i>With a lot of help</i>
Creating and managing a budget for bills and regular payments	<i>Independently</i>	<i>With some help</i>	<i>With a lot of help</i>
Creating and managing a budget for personal and/or recreational spending	<i>Independently</i>	<i>With some help</i>	<i>With a lot of help</i>
Processing bills and regular payments – e.g. making payments through online banking	<i>Independently</i>	<i>With some help</i>	<i>With a lot of help</i>
Conducting financial transactions – e.g. in-person payments, using an eftpos card	<i>Independently</i>	<i>With some help</i>	<i>With a lot of help</i>
Keeping your money secure	<i>Independently</i>	<i>With some help</i>	<i>With a lot of help</i>

STEP 3

For the skills where you have circled that you need either 'some help' or 'a lot of help', transfer these skills to table **A** on the next worksheet: **Review your money history**.