



## Transition Milestones - Financial

Name: \_\_\_\_\_ Age: \_\_\_\_\_ Date \_\_\_\_\_

This transition developmental checklist focuses on activities to help youth gain skills and abilities needed to reach their highest level of independence and ability. The list may not apply to all. It is not comprehensive.

### Financial Skills & Abilities

		Yes	No	N/A	Need More Info	Age to Discuss
1	Do you know the value of money (coins and bills)?					
2	Do you receive an allowance?					
3	Are you able to count change?					
4	Do you pay for items at the store?					
5	Do you pay or arrange payments for your medications?					
6	Do you have a bank account?					
7	Do you need a joint bank account and someone to help you oversee your money?					
8	Do you know how to write a check and/or use a debit card?					
9	Are you able to balance a checkbook?					
10	Do you know how to gain credit (apply for a credit card, line of credit, loan, etc...)?					
11	Do you know what a budget is?					
12	Do you know your strengths and interests?					
13	Do you know people or agencies that can help you find a job?					
14	Do you know what taxes are?					
15	Do you manage your money and budget household expenses? (housing, food, heat, phone, insurance, etc...)					

		Yes	No	N/A	Need More Info	Age to Discuss
16	Do you know how your living expenses will be paid when you become an adult?					
17	Do you know about special programs to help pay for job training or college?					
18	Do you get financial help with school or work?					
19	Do you plan to work to support yourself?					
20	Are you able to fill out an application?					
21	Do you know about government programs for income support? (Supplemental Security Income, Social Security Disability Income)					
22	Have you applied for government income support (SSI), if needed?					
23	Do you have a representative payee, guardian of the estate or power of attorney, if needed?					
24	Do you have a Special Needs Trust set up to protect your finances and program benefits, if needed?					
25	Do you have a will?					
26	Do you know the civil rights of persons with disabilities?					

Think about what you want to work on. Make some notes and discuss with those people that are helping you prepare for your future.

**Notes for Me:**

I want to know more about

List what you need to work on to help you learn how to take care of yourself in the future. You can ask the people who are helping you plan for your future to work on this with you.

Adapted with permission from the University of Illinois of Chicago Specialized Care For Children  
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