Financial Capability Topics Chart 4/15/21 

Counselor Name:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Office Hour Topics | Week of April 19 | Week of April 29 | Week of May 6 | Week of May 13 | Week of May 20 |
| **Financial Health Assessment** |  |  |  |  |  |
| **Money Conversations Regarding Financial Goals** |  |  |  |  |  |
| **Shared Budget Worksheet** |  |  |  |  |  |
| **Shared Credit Score Resources** |  |  |  |  |  |
| **Referred to CWIC** |  |  |  |  |  |
| **Discussed Work Incentives** |  |  |  |  |  |
| **Discussed ABLE and Shared Information** |  |  |  |  |  |
| **Shared Financial tools: Rate Your Financial Behavior, Spending Diary, STAR goals, Spending Percent Guidelines, etc.** |  |  |  |  |  |
| **Discussed safe and affordable financial products**  |  |  |  |  |  |
| **Identity Theft Resources** |  |  |  |  |  |
| **Other** |  |  |  |  |  |
| **Other** |  |  |  |  |  |
| **Other** |  |  |  |  |  |