

FINANCIAL CONCERNS: QUESTIONS TO ADD TO A CLINICAL INTERVIEW

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Current Financial Status

What are your current sources of income?

How much income do you get per month?

Where do your income checks (social security, pension) get mailed to or get deposited to?

What are your bank accounts? Checking? Savings? Other?

What are your investments? Stocks? Bonds? Mutual Funds? Other?

What property and home(s) do you own?

Any significant personal property? Car(s)? Boat(s)?

What are your total assets?

What are your total debts?

Experiences of Exploitation

In the past few months, have you lent money to anyone? Who? For what reason?

In the past few months, have you given or made gifts of money to anyone? Who? Why?

In the past few months has anyone asked you for money?

Do you have any children, family members, or friends to whom you give money?

Do you know anyone with alcohol, drug, or legal problems whom you help out financially?

Have you ever had money stolen? How? When?

Have you ever been cheated out of your money? How? When?

Have you ever been involved with adult protective services for money issues? Why? When?

Are you currently involved in any business transactions?

Do you have a will?

Are you currently involved with or planning any changes to your will?

Current Money Management

Does anyone help you pay your bills?

Does anyone help you manage your money?

Preferences for the Future

If you needed help, who would you like to help you?

Do you have enough money to provide for yourself in your retirement?

How would you like to invest and manage your money in the future?