

FAS3 Confidential Financial Assessor's Report

Financial Assessment Scheme: Financial Assessor's Report to the Student Finance Panel

Name of Student: _____ Date of interview: _____
 Location of Interview: Church House/By telephone/Other (please specify)

1. Background information relating to figures on FAS1 form

Accommodation	
Children	College students? Other dependents?
Other expenditure	
Let property	
Spouse / Civil Partner's income	Detailed calculation
Other earnings	
Any other benefits / Sundry	

2. Comparison of figures before and after Financial Assessment interview

	FAS1 Figures	Financial Interview
Total Estimated Expenditure:		
Total Estimated Income:		
Source of difference		

3. Debt: personal loans, credit cards, car finance etc

4. Assessment of student’s financial literacy

What level would you and the student assign to this? Please tick the one which best describes them.

- Previous experience of difficulties in managing personal finances
- No apparent cause for concern in managing personal finances
- Good personal financial management and working knowledge of accounts

5. Any additional comments and recommendations:

Signed:

Financial Assessor

Student

Date