<table>
<thead>
<tr>
<th>Case ID</th>
<th>Adult/Youth</th>
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<th>Gender</th>
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<td></td>
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<tr>
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<td></td>
<td>White</td>
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</tbody>
</table>

### Counting Money

<table>
<thead>
<tr>
<th>Example</th>
<th>Dialogue</th>
<th>Correct</th>
<th>Incorrect</th>
</tr>
</thead>
<tbody>
<tr>
<td>E2</td>
<td>Point to $4.32. Say, “$4.32.” Count out 4 dollars and 32 cents. “One, two, three, four dollars and 32 cents.”</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### “Matching” Money

<table>
<thead>
<tr>
<th>Example</th>
<th>Dialogue</th>
<th>Correct</th>
<th>Incorrect</th>
</tr>
</thead>
<tbody>
<tr>
<td>E3</td>
<td>Say, “Same, same.” Move your finger in front of all the images below the line to indicate the student should point to the same image below. Say, “Same, same.” Using one hand moving from the amount at the top of the page to each of the currencies below, point to each number and ask, “Same, same? No.” as you point to each number until you arrive at the $1. Then say, “Same, same.” and point to number and $1 bill.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Money Identification

<table>
<thead>
<tr>
<th>Example</th>
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<th>Incorrect</th>
</tr>
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</table>
| E4      | Say, “$5.00” Indicate that the student should point to the correct response.  
- If the student does not understand, say, “$5.00?” Point to each of the answers saying “yes” and “no” as appropriate  
- Say, “$5.00” but do not point. Indicate for the student to point to the correct response. |         |           |

### Basic Banking

<table>
<thead>
<tr>
<th>#</th>
<th>Dialogue</th>
<th>Correct</th>
<th>Incorrect</th>
</tr>
</thead>
</table>
| 6  | Say, “What are two kinds of bank accounts?”  
- Savings  
- Checking |         |           |
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>E1.</td>
<td>$3.24</td>
</tr>
<tr>
<td>E2.</td>
<td>$4.32</td>
</tr>
<tr>
<td>1.</td>
<td>$5.37</td>
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</tbody>
</table>
$5.00
3. $20.00
<table>
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<tr>
<th>Case ID</th>
<th>Ethnic/Racial Background (Circle One)</th>
<th>拨款 Hawaiian or other Pacific Islander</th>
<th>American Indian and Alaska Native</th>
<th>White</th>
<th>Black or African American</th>
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**Basic Banking**

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<th>Example</th>
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<tbody>
<tr>
<td>E5</td>
<td>Say, “What are two kinds of bank accounts?” Savings Checking</td>
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</table>
E1. $3.24

E2. $4.32

1. $5.37
$1.00
2. $5.00
5.
<table>
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<tr>
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<td></td>
</tr>
<tr>
<td></td>
<td>American Indian and Alaska Native Hispanic</td>
<td></td>
</tr>
</tbody>
</table>

1) At a restaurant, your check costs $6.00. You give them $10.00. How much change should you receive?
   - a. $1.00
   - b. $5.00
   - c. $6.00
   - d. $4.00
   - e. Don’t Know

2) What does a budget include?
   - a. Expenses
   - b. Income
   - c. Savings
   - d. All of these
   - e. Don’t Know

3) How much did money did this person receive this week?
   - a. $1451.28
   - b. $1000.00
   - c. $709.74
   - d. $159.50
   - e. Don’t Know

---

**Sample Company Name, Sample Company Address, 95220**

**EARNINGS STATEMENT**

<table>
<thead>
<tr>
<th>EMPLOYEE NAME</th>
<th>SOCIAL SEC.ID</th>
<th>EMPLOYEE ID</th>
<th>CHECK NO.</th>
<th>PAY PERIOD</th>
<th>PAY DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Robert</td>
<td>XXX-XX-6665</td>
<td>454545</td>
<td>259248</td>
<td>01/23/14</td>
<td>01/31/14</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>INCOME</th>
<th>RATE</th>
<th>HOURS</th>
<th>CURRENT TOTAL</th>
<th>PATHHOMES</th>
<th>FICA MED TAX</th>
<th>FICA SS TAX</th>
<th>FED TAX</th>
<th>CA ST TAX</th>
<th>SDI</th>
<th>CURRENT TOTAL</th>
<th>YEAR-TO-DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>GROSS WAGES</td>
<td>1,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>FICA MED TAX</td>
<td>14.50</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>FICA SS TAX</td>
<td>62.00</td>
<td></td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FED TAX</td>
<td>159.50</td>
<td></td>
<td></td>
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<tr>
<td>CA ST TAX</td>
<td>44.26</td>
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<td></td>
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<tr>
<td>SDI</td>
<td>10.00</td>
<td></td>
<td></td>
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<table>
<thead>
<tr>
<th>YTD TOTAL</th>
<th>YTD DEDUCTIONS</th>
<th>YTD NET PAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>5,000.00</td>
<td>1,451.28</td>
<td>3,548.72</td>
</tr>
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<tr>
<th>TOTAL</th>
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</thead>
<tbody>
<tr>
<td>1,000.00</td>
<td>290.26</td>
<td>709.74</td>
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</tbody>
</table>
4) When I put money into my bank account, this is a…
   a. Deposit
   b. Withdrawal
   c. Credit Union
   d. Credit card
   e. Don’t Know

5) I should keep this document in a safe place, NOT in my wallet.
   a. Driver’s License
   b. Green card
   c. Social Security card/Passport
   d. Don’t Know

6) Properly write a check for $300.64.
   
   (Note: Must be completely correct for point.)

7) Understanding Money is important to my family and me.
   Agree       Disagree       I don’t know.
Part 2

8) To keep good credit, I should
   a. Pay bills on time
   b. Keep balance on credit card low
   c. Check my credit score
   d. All of the above
   e. Don’t Know

9) Circle the 3 most common loans:
   a. Home
   b. Buying a car
   c. Personal
   d. Clothing
   e. Don’t Know

10) Financial Goals are important to my family and me.
    Yes  No  Don’t Know

11) What contract will you sign when you move into an apartment?
    a. Lease
    b. Bank Statement
    c. Receipt
    d. Pay Stub
    e. Don’t Know
12) On a scale of 1-5, where 1= Not Important and 5= Very Important, circle how important you think financial literacy is.

1  2  3  4  5
1=Not Important  2  3  4  5=Very Important

13) I feel like I am in control over my finances.
   Agree       Disagree       I don’t know

14) How did you hear about the training?
1) What does a budget include?
   a. Expenses
   b. Income
   c. Savings
   d. All of these
   e. Don’t Know

2) When I put money into my bank account, this is a…
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**INCOME**

- GROSS WAGES: $1,000.00

**DEDUCTIONS**

- FICA MED TAX: $14.50
- FICA SS TAX: $62.00
- FED TAX: $159.50
- CA ST TAX: $44.26
- SDI: $10.00

**YEAR-TO-DATE**

- GROSS WAGES: $5,000.00
- DEDUCTIONS: $1,451.28
- NET PAY: $3,548.72
4) I should keep this document in a safe place, NOT in my wallet.
   a. Social Security card/Passport
   b. Driver’s License
   c. Green card
   d. Don’t Know

5) Properly write a check for $300.64.
   
   *(Note: Must be completely correct for point.)*

   ![Check](image)

6) At a restaurant, your check costs $6.00. You give them $10.00. How much change should you receive?
   a. $1.00
   b. $5.00
   c. $6.00
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   Agree  Disagree  I don’t know
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Agree             Disagree           I don’t know

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