LP 2 Financial Self-Assessment Worksheet

Name ______________________________________

Directions:
Use this worksheet to determine how your financial assessment will inform your next steps in accessing land.

Please select all statements that apply to you.

Key Financial Factors

☐ I can list the key financial factors that affect my land tenure decisions (please list them here):
   1. _______________________________________________________________
   2. _______________________________________________________________
   3. _______________________________________________________________
   4. _______________________________________________________________

☐ I need assistance with listing the key financial factors that affect my land tenure decisions.

Financial Obligations Associated with Land Tenure Situations

☐ I can list financial obligations related to leasing or ownership. (Please list below.)
   _______________________________________________________________
   _______________________________________________________________
   _______________________________________________________________

☐ I do not completely understand financial obligations related to leasing or ownership.

☐ I need help understanding financial obligations related to leasing or ownership.

Net Worth

☐ I understand how to calculate my net worth.

☐ I need help calculating my net worth.

☐ Based on my net-worth, I believe I may be eligible for a mortgage or loan.

☐ Based on my net-worth, I do not believe I am eligible for a mortgage or loan.

Income Statement

☐ I understand what an income statement is.

☐ I understand how to use an income statement to inform a potential landlord or lender.

☐ I do not understand what an income statement is.

☐ I do not understand how to use an income statement to inform a potential landlord or lender.

Cash Flow Budget

☐ I understand how to create a cash flow budget.

☐ I need help creating a cash flow budget.

☐ I am still filling in the exact numbers I need to complete a cash flow budget.

☐ I understand how my cash flow varies throughout the year.

☐ Based on my monthly cash flow, I believe I can set aside $______________/month toward a land tenure situation.

4/10/2020