

Financial Assessment Form Sample

This **financial assessment form** sample for nonprofit organizations helps evaluate fiscal health and manage resources efficiently. It provides a structured approach to reviewing income, expenses, and financial policies. Using this form ensures transparency and supports strategic planning for nonprofit success.

Organization Information

Organization Name	
Address	
Fiscal Year	
Contact Person	
Email / Phone	

Income Overview

Source	Projected Amount	Actual Amount	Comments
Grants			
Donations			
Membership Fees			
Program Income			
Other			

Expenses Overview

Category	Budgeted Amount	Actual Amount	Variance
Program Services			
Administrative			
Fundraising			
Other			

Financial Policies & Controls

Policy/Control Area	Present?	Comments/Action Needed
Annual Budget Approval	<input type="checkbox"/>	
Regular Financial Reporting	<input type="checkbox"/>	
Internal Controls in Place	<input type="checkbox"/>	
Reserve Policy	<input type="checkbox"/>	

Financial Health Summary

Summarize strengths, challenges, and key action steps to improve the organization's fiscal health:

Approval and Date

Prepared By		Date	
Approved By		Date	