

# 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

<b>Prepared By</b>		<b>Date</b>	
<b>Approved By</b>		<b>Date</b>	