

This form should only be used for learners **not** using the OCR Evidence Booklet or if supplementary tasks are to be inserted in to the Evidence Booklet.

## Level 1

Candidate's name: .....

**The work you submit for assessment must be your own.**

**You must not copy from someone else or allow someone else to copy from you.**

I confirm that this is all my own work.

Candidate's signature .....

Date .....

Assessment criteria	Document/Page number	Attached (insert ✓)
1.1 Explain the uses of financial documents		
1.2 Define key terms used on a wage slip and a bank statement		
2.1 Outline why it is important to open a current account when you start earning an income		
2.2 Explain why it is important to research different current accounts		
2.3 Identify the key steps taken to open a current account		
3.1 Explain income		
3.2 Explain expenditure		

Assessment criteria	Document/Page number	Attached (insert ✓)
3.3 Explain how to manage surplus		
3.4 Explain the advantages and disadvantages of different payment methods		
3.5 Review alternative payment methods for a product		
4.1 Outline the problems that being in debt may cause an individual and the family		
4.2 Identify people or organisations that could help individuals or families in debt		
4.3 Outline how people or organisations can help individuals or families in debt		
4.4 Identify how these people or organisations can be accessed		
5.1 Outline why it is important for an individual to have a good credit rating		