


FINANCIAL CHECKLIST

Complete this checklist using the Financial Planning Packet instructions on pages 3-6.

Tasks	Completed 
Open a Bank of America or Wells Fargo checking AND savings account in students name (to be done at orientation)	<input type="checkbox"/>
Set up account with Comcast or AT&T if desired (TV/Internet/Phone) in students name (once student apartment assignments are received)	<input type="checkbox"/>
Set up account with Pacific Gas & Electric (Electricity) in students name (once student apartment assignments are received)	<input type="checkbox"/>
Set up account with Cell Phone Company if student is not already on family plan in students name	<input type="checkbox"/>
Review and add any additional expenses to CLE Sample Monthly Expense Budget Form	<input type="checkbox"/>
Items to bring to Parent Orientation	
This financial planning packet, with Sample Monthly Expense completed	<input type="checkbox"/>
All debit cards, credit cards, checkbooks, etc. held by student to hand into CLE staff (to be secured in CLE safe)	<input type="checkbox"/>
Parent check book to pay for first months rent, other deposits	<input type="checkbox"/>
\$200 in cash to pay for three week's of student spending money, ID cards, laundry cards, etc (to be secured in CLE safe)	<input type="checkbox"/>

STEPS TO A SUCCESSFUL START

BUDGETING

On the following pages you will find sample budgets, including rent information for studios, one-bedrooms, and two-bedrooms, along with start-up costs. The start-up budget is higher due to tuition and books, items for the apartment, installations, and deposits. Please contact Jennifer Blocker, ILS Coordinator, to develop a start-up and ongoing monthly student budget - jblocker@experiencecle.com.

BANKING INFORMATION

Each student will set up a bank account, ideally through Bank of America or Wells Fargo. Each student should have a checking account linked to a savings account (to encourage savings), a debit card linked to the checking account, and a box of checks. Please contact CLE with the bank account information (account number, online username, and password).

SETTING UP UTILITIES

All students will be paying their utility bills during financial sessions, either through their checking account or online utility account. Please do the following to establish PG&E services for your apartment. **Please coordinate utility set-up with your roommate, if applicable.**

PACIFIC GAS AND ELECTRIC (PG&E)

- Visit www.pge.com for details.
- Call 1-800-PGE-5000 to set up service.
- The account should be set up in the student's name rather than the parents'. Any billing inquiries or changes to the account can ONLY be performed by the account holder.
- Please use student's phone number (rather than the parents') for the account.
- For logistic and roommate purposes, please make sure you ask for a PAPER bill.
- Once PG&E is installed, please inform CLE of all account information (account number, name on account, password information, etc.)

CABLE, INTERNET, AND PHONE

- Visit www.comcast.com or www.att.com for details
- The account should be set up in the student's name rather than the parents'. Any billing inquiries or changes to the account can ONLY be performed by the account holder.
- Please use student's phone number (rather than the parents') for the account.
- For logistic and roommate purposes, please make sure you ask for a PAPER bill.
- When cable/internet is installed, SOMEONE MUST BE AT THE APARTMENT during the scheduled appointment time block (student or parent).
- Once cable and/or internet are installed, please inform CLE of all account information (account number, name on account, password information, etc).

STUDENT START-UP BUDGET

Housing	Projected Cost	Suggested Provider	Amount/Mo
Rent and Deposit*	\$700-1600 + Deposit		
Cable TV / Internet Service / Phone	\$150	Comcast/AT&T	
Pacific Gas & Electric	\$150		
Groceries (Includes cleaning supplies and laundry)	\$320		
Entertainment & Recreation	\$150		
Transportation (bus / gas)	\$47 (Bus Pass) \$150 (Gas)		
Medical & Incidentals	\$100		
Eating out	\$150		
SUBTOTAL	Varies		
Other	Projected Cost	Amount Agreed/Mo	
Personal Items*	\$100		
School Books / Supplies*	\$150		
In-state Tuition*	\$300		
Total Monthly Budget	Varies		

*First Month Projection is higher due to start-up cost

MONTHLY STUDENT BUDGET

Housing	Projected Cost	Suggested Provider	Amount/Mo
Rent	\$700-\$900 or \$900-\$1600		
Cable TV / Internet Service / Phone	\$75	Comcast/AT&T	
Pacific Gas & Electric	\$50		
Groceries (Includes cleaning supplies and laundry)	\$320		
Entertainment & Recreation	\$150		
Transportation (bus / gas)	\$47 (Bus Pass) \$150 (Gas)		
Medical & Incidentals	\$50		
Eating out	\$65		
Total Projected Cost	Varies		