



**Proof Checklist** – Please attach all proof to SaveltUp form; this checklist shows the type of proof needed; under each category, the proof needed is in color below each item

**Budget:**

- Evaluate current spending habits by writing down your monthly bills and expenses (5 points)  
Provide document of written expenses and bills
- Create a realistic budget to help identify areas where you need to make a change (10 points)  
Provide budgeting sheet filled out
- Sign up for Bill Pay to help track payments (10 points)  
FORUM will check on this for you; no proof necessary
- Open a Santa Savings or Weekly 5 Club with direct deposit to create regular saving habits (20 points)  
FORUM will check on this for you; no proof necessary
- Other \_\_\_\_\_ (5 points)  
Provide proof for this item

**Thrift:**

- Start clipping coupons or using online coupon codes (5 points)  
Provide receipts showing the coupons you used
- Eat at home at least 1 more time per week (2 points)  
No proof necessary
- Have at least 5 merchant loyalty cards that help you save money where you shop (5 points)  
Provide receipts showing the use of the 5 loyalty cards or a copy of the cards
- Open a Rewards Checking account to earn money for signature based debit card transactions (15 points)  
FORUM will check on this for you; no proof necessary
- Other \_\_\_\_\_ (2 points)  
Provide proof for this item

**Savvy:**

- Turn your heat or air conditioning down/up when no one is home (2 points)  
No proof necessary
- Submit to become a featured saver on our website (10 points)  
FORUM will verify this based on submissions we receive
- Open a CommonCents account which allows you to save money every time you use your debit card (10 points)  
FORUM will check on this for you; no proof necessary
- Post a comment on our [SaveItUp](#) blog to share your savings tips and stories (5 points)  
FORUM will verify this by checking the SaveltUp blog
- Other \_\_\_\_\_ (2 points)  
Provide proof for this item

**Goals:**

- Reduce credit card spending or pay off balances every month (10 points)  
Provide copies of credit card bills to show balance is being paid off or turn in credit report validated by FORUM Representative
- Share your goals with a FORUM Representative/Financial Coach so they can help keep you on track (15 points)  
If you have met with and shared your goals with a Financial Coach throughout the Challenge, have them write their initials next to this item

- Increase your retirement savings or open an Individual Retirement Account (20 points)  
FORUM will check for this if your retirement savings is with FORUM; if your retirement savings is at another institution, you'll need to provide proof of that account
- Set and meet a dollar amount you would like to save during the challenge (15 points)  
Your Financial Coach will need to write their initials next to this item if you have met your savings goal for this challenge
- Other \_\_\_\_\_ (10 points)  
Provide proof for this item

**Education:**

- Attend a money management class or seminar (10 points)  
Provide sign-up sheet, receipt for class, or worksheets you went through for class
- Get a free credit report and analysis from your FORUM Financial Coach (10 points)  
Provide copy of credit report with initials of Financial Coach
- Sign up to receive FORUM's "Savings Tip of the Week" (5 points)  
FORUM will check your subscription for this
- Subscribe or read an online money magazine or blog (5 points)  
Provide print out of online magazine or blog you have been reading unless it is FORUM's, which FORUM can check
- Other \_\_\_\_\_ (2 points)  
Provide proof for this item