

Please take a moment to complete this survey about your personal finances. Results from the survey will help improve this program and provide better services in the future. Completing this survey is voluntary and we thank you for your time!

1. Over the last 3 months, have you followed a personal budget, spending plan, or financial plan?

- Yes No Don't know

2. Do you currently have at least one financial goal?

- Yes
 No → Go to Question 3

2a. What is your main financial goal?

3. How confident are you in your ability to achieve a financial goal you set for yourself today?

- Not at all confident Less than confident Somewhat confident Relatively confident Very confident

4. In the last 3 months, did you use an automatic deposit or transfer to put money away for a future use such as saving for retirement or education?

- Yes No Don't know

5. Have you set aside emergency or rainy day funds that would cover your expenses for 3 months, in case of sickness, job loss, economic downturn, or other emergencies?

- Yes No Don't know

6. Over the past 3 months, would you say your household's spending was less than, more than, or about equal to your income? Please do not include large purchases such as a house or car.

- Less than More than Equal to Don't know

7. In the last 3 months, have you paid a late fee on a loan or bill?

- Yes No Don't know

8. How would you rate your current credit record?

- Very bad Bad About average Good Very good Don't know