

Personal Finance Survey

Let's Start

Question - 1

Please share your age.

Question - 2

Please select your marital status.

- Unmarried
- Married
- Divorced/Separated
- Widowed

Question - 3

How would you describe your ability to manage your finances?

- I understand money management really well
- I understand what I need to know about money management fairly well
- I wish I knew a little more about managing money
- I do not understand money management well

Question - 4

Which of the following attributes of finance do you wish you understood better? Select all that apply.

- Credit
- Life insurance
- Vehicle insurance
- Health insurance
- Investments
- Budgeting
- Loans
- Other _____

Question - 5

Please rate your level of agreement with the following statements.

Strong
Disagree

Strongly
Agree

Saving and investing is important

I am constantly worried about finances

I am in full control of my financial situation at present

I believe i have the information I need to make informed financial decisions

I have planned for my future

Question - 6

Which of the following types of accounts do you have? Select all that apply.

- Checking
- Savings
- Stocks, bonds etc.

Question - 7

How important do you feel it is to work with a financial advisor to plan your finances?

- Extremely important
- Somewhat important
- Neutral
- Not very important
- Not important at all

Thank you for taking part in our survey! Your responses will help us serve you better.