

# Financial Wellness Support Survey Template

All questions are optional. Follow each question's directions.

Write your answers to the open questions in the space provided.

This survey helps plan money-related support for adults. Participation and every question are optional. Do not provide income, balances, debts, account details or personal case histories. Responses will not request individual assistance. Use the separately stated service contact if you want help; do not assume this survey is monitored for urgent needs.

## 1. During the past four weeks, how often have money-related concerns been on your mind?

- ☐ Never
- ☐ Rarely
- ☐ Sometimes
- ☐ Often
- ☐ Very often
- ☐ Prefer not to answer

## 2. How clear are you about where to find the financial support resources currently offered by the named organizer?

- ☐ Not at all clear
- ☐ Slightly clear
- ☐ Moderately clear
- ☐ Very clear
- ☐ Extremely clear
- ☐ No resources have been described
- ☐ Prefer not to answer

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### 3. During the past four weeks, did you look for information or support about a money-related question?

- ☐ Yes
- ☐ No
- ☐ Not sure
- ☐ Prefer not to answer

### 4. Which topic would you most like a support program to address?

- ☐ Planning everyday spending
- ☐ Understanding bills or charges
- ☐ Building a savings routine
- ☐ Finding appropriate debt-support services
- ☐ Understanding workplace financial benefits
- ☐ Another topic
- ☐ No topic at present
- ☐ Prefer not to answer

### 5. Which way of accessing support would you prefer?

- ☐ Written information to use privately
- ☐ A live group session
- ☐ A recorded session
- ☐ A one-to-one conversation with an appropriate professional
- ☐ A directory of independent services
- ☐ Another format
- ☐ No preference
- ☐ Not interested at present

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## 6. What would most limit your use of a support program?

- ☐ Time or scheduling
- ☐ Cost
- ☐ Privacy concerns
- ☐ Unclear independence of the provider
- ☐ Difficulty using the delivery format
- ☐ Unsure whether it would be relevant
- ☐ Another barrier
- ☐ No main barrier
- ☐ Prefer not to answer

## 7. What general change would make money-related support easier to use? Please avoid personal financial details.

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