

Personal Finance Survey Template

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

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

Use these questions as a starting point. Show the options as written below, replace bracketed placeholders with the real personal finance survey materials, and leave every item optional.

1. How often do you review money coming in and going out?

- ☐ Weekly
- ☐ Monthly
- ☐ Less often
- ☐ Never
- ☐ Prefer not to say

2. How do you usually keep track of upcoming bills?

- ☐ Calendar or reminders
- ☐ Budget app
- ☐ Paper list
- ☐ Memory
- ☐ Someone else handles it
- ☐ Prefer not to say

3. How confident do you feel planning for an irregular expense?

- ☐ Very confident
- ☐ Somewhat confident
- ☐ Neither
- ☐ Somewhat unconfident
- ☐ Very unconfident
- ☐ Prefer not to say

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4. Which money topics would you like more support with?

- ☐ Budgeting
- ☐ Bills
- ☐ Savings goals
- ☐ Credit basics
- ☐ Comparing financial products
- ☐ None currently
- ☐ Other
- ☐ Prefer not to say

5. What most makes it difficult to follow a plan?

- ☐ Income changes
- ☐ Unexpected costs
- ☐ Competing obligations
- ☐ Tools are confusing
- ☐ Hard to start
- ☐ No current difficulty
- ☐ Other
- ☐ Prefer not to say

6. How would you prefer to learn about money management?

- ☐ Short article
- ☐ Video
- ☐ Group workshop
- ☐ One-to-one session
- ☐ Interactive worksheet
- ☐ No preference

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7. What question would you like a financial educator to answer?
