

## Well Being 294

### **FB3\_intro** intro FB3

Now we will ask you about your confidence in your ability to perform certain tasks. For each of the following statements below, please indicate whether you feel extremely confident, very confident, somewhat confident, not very confident or not confident at all.

- 1 Extremely confident
- 2 Very confident
- 3 Somewhat confident
- 4 Not very confident
- 5 Not confident at all

### **FB3a** able to budget and manage income

I am able to budget and manage my income and expenses on a day-to-day basis

- 1 Extremely confident
- 2 Very confident
- 3 Somewhat confident
- 4 Not very confident
- 5 Not confident at all

### **FB3b** able to plan and save for future

I am able to plan and save for my future

- 1 Extremely confident
- 2 Very confident
- 3 Somewhat confident
- 4 Not very confident
- 5 Not confident at all

### **FB4** overall knowledge about personal finance

How would you rate your overall knowledge about personal finance, such as knowledge of interest compounding, inflation and risk diversification?

- 1 Excellent
- 2 Good
- 3 Average
- 4 Fair
- 5 Poor

### **FB5** rate overall financial expertise

How would you rate your overall financial expertise, such as budgeting, saving, and managing your money?

- 1 Excellent
- 2 Good
- 3 Average
- 4 Fair
- 5 Poor

### **FP5** last time checked credit score

When was the last time you checked your credit score?

- 1 Within the last 1 month
- 2 Within the last 6 months
- 3 Within the last year
- 4 Within the last 5 years
- 5 More than 5 years ago
- 6 Never

**FP6** how likely to check credit score in the next year

Within the next year, how likely is it that you will check your credit score?

- 1 Very likely
- 2 Likely
- 3 Neither likely nor unlikely
- 4 Unlikely
- 5 Very unlikely

**FP7** last time made or reviewed budget

When was the last time you made or reviewed a budget that includes a list of your monthly expenses?

- 1 Within the last 1 month
- 2 Within the last 6 months
- 3 Within the last year
- 4 Within the last 5 years
- 5 More than 5 years ago
- 6 Never

**FP8** how likely plan to make or review budget

Within the next year, how likely is it that you will make or review a budget that includes a list of monthly expenses?

- 1 Very likely
- 2 Likely
- 3 Neither likely nor unlikely
- 4 Unlikely
- 5 Very unlikely

**FP9** last time sorted through and reviewed past financial statements

When was the last time you sorted through and reviewed your past financial statements?

- 1 Within the last 1 month
- 2 Within the last 6 months
- 3 Within the last year
- 4 Within the last 5 years
- 5 More than 5 years ago
- 6 Never

**FP10** how likely to sort through and review past financial statements

Within the next year, how likely is it that you will sort through and review past financial statements?

- 1 Very likely
- 2 Likely
- 3 Neither likely nor unlikely
- 4 Unlikely
- 5 Very unlikely

**FP11** last time used a retirement savings calculator

When was the last time you used a retirement savings calculator to determine how much you would have for retirement ?

- 1 Within the last 1 month
- 2 Within the last 6 months
- 3 Within the last year
- 4 Within the last 5 years
- 5 More than 5 years ago
- 6 Never

**FP12** how likely to use a retirement savings calculator

Within the next year, how likely is it that you will use a retirement saving calculator to determine how much to save for your retirement?

- 1 Very likely
- 2 Likely
- 3 Neither likely nor unlikely
- 4 Unlikely
- 5 Very unlikely

**FP13** last time thought about or made a personalized financial plan

When was the last time you thought about or made a personalized financial plan, either on your own or with the help of an advisor?

- 1 Within the last 1 month
- 2 Within the last 6 months
- 3 Within the last year
- 4 Within the last 5 years
- 5 More than 5 years ago
- 6 Never

**FP14** how likely to make a personalized financial plan

Within the next year, how likely is it that you will make a personalized financial plan either on your own or with the help of an advisor?

- 1 Very likely
- 2 Likely
- 3 Neither likely nor unlikely
- 4 Unlikely
- 5 Very unlikely

**CS\_001** HOW PLEASANT INTERVIEW

Could you tell us how interesting or uninteresting you found the questions in this interview?

- 1 Very interesting
- 2 Interesting
- 3 Neither interesting nor uninteresting
- 4 Uninteresting
- 5 Very uninteresting