



# Questionnaire

NAME OR NUMBER

## Part 1: How well does this statement describe you or your situation?

| This statement describes me   | Completely               | Very well                | Somewhat                 | Very little              | Not at all               |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1. I could handle a major unexpected expense  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. I am securing my financial future  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Because of my money situation, I feel like I will never have the things I want in life | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. I can enjoy life because of the way I'm managing my money                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. I am just getting by financially   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. I am concerned that the money I have or will save won't last                           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## Part 2: How often does this statement apply to you?

| This statement applies to me   | Always                   | Often                    | Sometimes                | Rarely                   | Never                    |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 7. Giving a gift for a wedding, birthday or other occasion would put a strain on my finances for the month | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. I have money left over at the end of the month  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. I am behind with my finances  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. My finances control my life  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## Part 3: Tell us about yourself.

|   |   |   |
|---|---|---|
| 11. How old are you?                    | <input type="checkbox"/> 18-61                | <input type="checkbox"/> 62+                              |
| 12. How did you take the questionnaire? | <input type="checkbox"/> I read the questions | <input type="checkbox"/> Someone read the questions to me |



# Scoring worksheet

NAME OR NUMBER

1. Select the person's answers, record the response value in the right hand column and add up the total values for each part of the questionnaire.

| This statement describes me   | Completely | Very well | Somewhat | Very little | Not at all | Response value |
|---|------------|-----------|----------|-------------|------------|----------------|
| 1. I could handle a major unexpected expense  | 4          | 3         | 2        | 1           | 0          |                |
| 2. I am securing my financial future  | 4          | 3         | 2        | 1           | 0          |                |
| 3. Because of my money situation, I feel like I will never have the things I want in life | 0          | 1         | 2        | 3           | 4          |                |
| 4. I can enjoy life because of the way I'm managing my money                              | 4          | 3         | 2        | 1           | 0          |                |
| 5. I am just getting by financially   | 0          | 1         | 2        | 3           | 4          |                |
| 6. I am concerned that the money I have or will save won't last                           | 0          | 1         | 2        | 3           | 4          |                |
| <b>Part 1 subtotal:</b>   |            |           |          |             |            |                |

| This statement applies to me   | Always | Often | Sometimes | Rarely | Never | Response value |
|--|--------|-------|-----------|--------|-------|----------------|
| 7. Giving a gift for a wedding, birthday or other occasion would put a strain on my finances for the month | 0      | 1     | 2         | 3      | 4     |                |
| 8. I have money left over at the end of the month  | 4      | 3     | 2         | 1      | 0     |                |
| 9. I am behind with my finances  | 0      | 1     | 2         | 3      | 4     |                |
| 10. My finances control my life  | 0      | 1     | 2         | 3      | 4     |                |
| <b>Part 2 subtotal:</b>  |        |       |           |        |       |                |

**Total response value:** \_\_\_\_\_

## 2. Find the financial well-being score

How old is the person?

18-61       62+

How did the person take the questionnaire?

Self-administered

Administered by someone else

Because scores vary based on age and how the questionnaire was administered, you must convert the total response value to a financial well-being score.

- Find the row that corresponds to the total response value.
- Follow that row across to the column that corresponds to the person's age and how the questionnaire was administered.
- Record the final score.

**Financial well-being score:**

| Total response value | Questionnaire self-administered |     | Questionnaire administered by someone else |     |
|----------------------|---------------------------------|-----|--|-----|
|                      | 18-61                           | 62+ | 18-61                                      | 62+ |
| 0                    | 14                              | 14  | 16   | 18  |
| 1                    | 19                              | 20  | 21   | 23  |
| 2                    | 22                              | 24  | 24   | 26  |
| 3                    | 25                              | 26  | 27   | 28  |
| 4                    | 27                              | 29  | 29   | 30  |
| 5                    | 29                              | 31  | 31   | 32  |
| 6                    | 31                              | 33  | 33   | 33  |
| 7                    | 32                              | 35  | 34   | 35  |
| 8                    | 34                              | 36  | 36   | 36  |
| 9                    | 35                              | 38  | 38   | 38  |
| 10                   | 37                              | 39  | 39   | 39  |
| 11                   | 38                              | 41  | 40   | 40  |
| 12                   | 40                              | 42  | 42   | 41  |
| 13                   | 41                              | 44  | 43   | 43  |
| 14                   | 42                              | 45  | 44   | 44  |
| 15                   | 44                              | 46  | 45   | 45  |
| 16                   | 45                              | 48  | 47   | 46  |
| 17                   | 46                              | 49  | 48   | 47  |
| 18                   | 47                              | 50  | 49   | 48  |
| 19                   | 49                              | 52  | 50   | 49  |
| 20                   | 50                              | 53  | 52   | 50  |
| 21                   | 51                              | 54  | 53   | 52  |
| 22                   | 52                              | 56  | 54   | 53  |
| 23                   | 54                              | 57  | 55   | 54  |
| 24                   | 55                              | 58  | 57   | 55  |
| 25                   | 56                              | 60  | 58   | 56  |
| 26                   | 58                              | 61  | 59   | 57  |
| 27                   | 59                              | 63  | 60   | 58  |
| 28                   | 60                              | 64  | 62   | 60  |
| 29                   | 62                              | 66  | 63   | 61  |
| 30                   | 63                              | 67  | 65   | 62  |
| 31                   | 65                              | 69  | 66   | 64  |
| 32                   | 66                              | 71  | 68   | 65  |
| 33                   | 68                              | 73  | 70   | 67  |
| 34                   | 69                              | 75  | 71   | 68  |
| 35                   | 71                              | 77  | 73   | 70  |
| 36                   | 73                              | 79  | 76   | 72  |
| 37                   | 75                              | 82  | 78   | 75  |
| 38                   | 78                              | 84  | 81   | 77  |
| 39                   | 81                              | 88  | 85   | 81  |
| 40                   | 86                              | 95  | 91   | 87  |

Learn more at [consumerfinance.gov/financial-well-being](https://consumerfinance.gov/financial-well-being)