

SURVEY ABOUT FINANCES

BACKGROUND INFORMATION

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| 1. Last Name: | 2. First Name: | 3. Date of Birth: |
| 4. Are you of Hispanic or Latino origin? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer 5. Race: <i>(select one or more)</i> <input type="checkbox"/> White <input type="checkbox"/> Black/African-American <input type="checkbox"/> Asian <input type="checkbox"/> Native Hawaiian or other Pacific Islander <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Prefer not to answer | 6. Living Situation: <input type="checkbox"/> Rent <input type="checkbox"/> Own <input type="checkbox"/> Staying with family/friends <input type="checkbox"/> Public housing <input type="checkbox"/> Homeless/shelter <input type="checkbox"/> Prefer not to answer | 7. Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Single (never married) <input type="checkbox"/> Divorced/Separated <input type="checkbox"/> Widowed <input type="checkbox"/> Prefer not to answer |
| | 8. How many adults (18 and over), including yourself, are in your household? <div style="text-align: center;">_____</div> | 9. How many children (under 18) are in your household? <div style="text-align: center;">_____</div> |

USE OF FINANCIAL SERVICES

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| 10. Did you have a bank account in the month before starting POP? <input type="checkbox"/> No account <input type="checkbox"/> Yes, savings account <input type="checkbox"/> Yes, checking account <input type="checkbox"/> Yes, both checking and savings account | 11. If you did not have a bank account in the month before starting POP, did you have one in the past? <div style="text-align: center;"><input type="checkbox"/> Yes <input type="checkbox"/> No</div> ➤ 11a. IF YES, why did you close it? <i>(check all that apply)</i> <input type="checkbox"/> I could not maintain the minimum balance <input type="checkbox"/> Fees were too high <input type="checkbox"/> I don't like dealing with banks <input type="checkbox"/> I don't trust banks <input type="checkbox"/> I had a negative experience with my bank <input type="checkbox"/> I have judgments/liens <input type="checkbox"/> It was frozen / garnished <input type="checkbox"/> Other reason: _____ <hr/> ➤ 11b. IF NO, why don't you have a bank account? <i>(check all)</i> <input type="checkbox"/> I can't maintain the minimum balance <input type="checkbox"/> Fees are too high <input type="checkbox"/> I tried but bank denied me <input type="checkbox"/> I don't have the required identification <input type="checkbox"/> I don't like dealing with banks <input type="checkbox"/> I don't trust banks <input type="checkbox"/> I had a negative experience with my bank <input type="checkbox"/> I have judgments / liens <input type="checkbox"/> I don't want my wages garnished |
| 12. Did you have any of the following in the month before starting POP? <i>(check all that apply)</i> <input type="checkbox"/> Prepaid card <input type="checkbox"/> Payroll card <input type="checkbox"/> EBT/Public Benefits card <input type="checkbox"/> Direct deposit to bank account <input type="checkbox"/> Direct deposit to payroll card | |
| 13. Have you used any of the following in the last month? <i>(check all that apply)</i> <input type="checkbox"/> Check-cashers <input type="checkbox"/> Money orders <input type="checkbox"/> Online bill pay <input type="checkbox"/> Pay day lender <input type="checkbox"/> Pawn shops | |

Other reason: _____

FINANCIAL INFORMATION

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|--|---|--|
| <p>14. If you had an unexpected expense or emergency of \$500, how confident are you that you could pay it?</p> <p><input type="checkbox"/> Not at all <input type="checkbox"/> A little <input type="checkbox"/> Somewhat <input type="checkbox"/> Very <input type="checkbox"/> Extremely</p> | <p>15. Do you use a budget or spending plan?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> | <p>16. Have you viewed your credit report in the past 12 months?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> |
| <p>20. About how often do you contribute to savings?</p> <p><input type="checkbox"/> Weekly <input type="checkbox"/> Every two weeks <input type="checkbox"/> Monthly <input type="checkbox"/> Several times a year <input type="checkbox"/> Once per year <input type="checkbox"/> Less than once per year <input type="checkbox"/> Never, do not contribute to savings</p> | <p>17. Are you saving regularly?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>18. Do you have any savings?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> | <p>19. If you have savings, about how much money do you have saved?</p> <p>\$ _____</p> <p>22. Do you trust banks?</p> <p><input type="checkbox"/> Not at all <input type="checkbox"/> A little <input type="checkbox"/> Somewhat <input type="checkbox"/> Very <input type="checkbox"/> Extremely</p> |
| <p>23. How much control do you feel over your finances?</p> <p><input type="checkbox"/> No control <input type="checkbox"/> A little control <input type="checkbox"/> In control <input type="checkbox"/> Very in control <input type="checkbox"/> Extremely in control</p> | <p>24. How would you rate your understanding of money-management?</p> <p><input type="checkbox"/> Very bad <input type="checkbox"/> Poor <input type="checkbox"/> Fair <input type="checkbox"/> Good <input type="checkbox"/> Excellent</p> | <p>25. How frequently do you pay your bills on time?</p> <p><input type="checkbox"/> Almost always <input type="checkbox"/> Often <input type="checkbox"/> Sometimes <input type="checkbox"/> Rarely <input type="checkbox"/> Never</p> |

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Specialist:

POP site:

Date: