

What Do You Know? – Money Smart for Older Adults

Instructor: _____ Date: _____

This form will allow you and the instructors to see what you know about protecting your finances both before and after the training. Read each statement below. Please circle the number that shows how much you agree with each statement.

Before the Training

	Strongly Disagree	Disagree	Agree	Strongly Agree
I am able to:				
1. Recognize elder financial exploitation.	1	2	3	4
2. Guard against identity theft.	1	2	3	4
3. Plan for unexpected loss of the ability to manage my finances.	1	2	3	4
4. Prepare financially for disasters.	1	2	3	4
5. Find other helpful resources for managing my money.	1	2	3	4

After the Training

	Strongly Disagree	Disagree	Agree	Strongly Agree
I am able to:				
6. Recognize elder financial exploitation.	1	2	3	4
7. Guard against identity theft.	1	2	3	4
8. Plan for unexpected loss of the ability to manage my finances.	1	2	3	4
9. Prepare financially for disasters.	1	2	3	4
10. Find other helpful resources for managing my money.	1	2	3	4

Evaluation Form

This evaluation will enable you to assess your observations of the *Money Smart for Older Adults* module. Please indicate the degree to which you agree with each statement by circling the appropriate number.

Overall, I felt the module was:

Excellent

Very Good

Good

Fair

Poor

	Strongly Disagree	Disagree	Agree	Strongly Agree
1. I achieved the training objectives.	1	2	3	4
2. The instructions were clear and easy to follow.	1	2	3	4
3. The slides were clear.	1	2	3	4
4. The slides enhanced my learning.	1	2	3	4
5. The time allocation was correct for this module.	1	2	3	4
6. The module included sufficient examples and exercises so that I will be able to apply these new skills.	1	2	3	4
7. The instructor was knowledgeable and well-prepared.	1	2	3	4
8. The worksheets are valuable.	1	2	3	4
9. I will use the worksheets again.	1	2	3	4
10. The participants had ample opportunity to exchange experiences and ideas.	1	2	3	4
11. I had knowledge of the subject matter before taking the module.	1	2	3	4

12. I have knowledge of the subject matter upon completion of the module.	1	2	3	4
13. Name of Instructor: _____ Please use the response scale and circle the appropriate number.	Strongly Disagree	Disagree	Agree	Strongly Agree
Objectives were clear & attainable	1	2	3	4
Made the subject understandable	1	2	3	4
Encouraged questions	1	2	3	4
Had technical knowledge	1	2	3	4

What was the most useful part of the training?

What was the least useful part of the training and how could it be improved?

Privacy Act Statement

5 U.S.C. 552a(e)(3) The information you provide to the Consumer Financial Protection Bureau (“CFPB”) will only be used to evaluate the Money Smart for Older Americans Training Sessions. The Bureau may obtain or access directly identifying information about participants. Information collected will be treated in accordance with the System of Records Notice (“SORN”), [CFPB.021 – CFPB Consumer Education and Engagement Records, 83 FR 23435](#). Although the Bureau does not anticipate further disclosing the information provided, it may be disclosed as indicated in the Routine Uses described in the SORN. Direct identifying information will only be used to facilitate the training and will be kept private except as required by law. This collection of information is authorized by Pub. L. No. 111-203, Title X, Sections 1013 and 1022, codified at 12 U.S.C. §§ 5493 and 5512. Participation in this evaluation is voluntary. You are not required to participate or share any identifying information and you may withdraw participation at any time. However, if you do not include the requested information, you may not be able to participate in the evaluation.

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