**Financial Wellbeing Survey**

**Purpose:** This anonymous survey is designed to assess financial wellbeing, establish a baseline, and track progress in our workplace culture and resources. Your responses will help shape future financial wellness initiatives and support strategies.

**Section 1: Understanding Financial Wellbeing**

1. What does financial wellbeing mean to you? (Select all that apply)

* Not being stressed about my finances
* Being debt/loan free
* Having enough savings to handle unexpected expenses
* Financial freedom to enjoy life
* Being able to meet monthly expenses
* Being able to retire when I want to
* Other (please specify): \_\_\_\_\_\_\_\_\_\_\_

2. Which of the following causes you the most stress? (Select one)

* My finances
* My health
* My job
* My relationships
* Planning for retirement
* Other (please specify): \_\_\_\_\_\_\_\_\_\_\_

3. What are your top financial concerns? (Select one)

* Not having enough emergency savings
* Not being able to retire when I want to
* Not being able to meet monthly expenses
* Job loss
* Paying rent/home loan on time
* Paying for education/personal loans
* Other (please specify): \_\_\_\_\_\_\_\_\_\_\_

4. How often do you feel stressed about your personal finances? (Select one)

* Never
* Rarely
* Sometimes
* Often
* Always

5. Do financial concerns affect your ability to focus at work? (Select one)

* Not at all
* Occasionally
* Frequently
* All the time

6. Issues with personal finances have been a distraction at work: (Select one)

* Daily
* Weekly
* Monthly
* Quarterly
* Never

7. Which of the following has been impacted by your financial worries? (Select all that apply)

* Health
* Relationships
* Productivity at work
* Attendance at work
* Other (please specify): \_\_\_\_\_\_\_\_\_\_\_
* None of these

**Section 2: Financial Knowledge & Habits**

8. How confident do you feel managing your personal finances? (Select one)

* Very confident
* Somewhat confident
* Neutral
* Not very confident
* Not confident at all

9. Do you currently use a budget to manage your finances? (Select one)

* Yes, regularly
* Sometimes
* No, but I’d like to learn
* No, and I’m not interested

10. Do you contribute to a retirement savings plan? (Select one)

* Yes, consistently
* Sometimes
* No, but I’d like to start
* No, and I’m not interested

11. Do you find it difficult to meet your household expenses on time each month?   
(Select one)

* Yes, every month is difficult
* Sometimes, it varies
* No

12. Would you be able to meet your basic expenses if you were out of work for an extended period? (Select one)

* Yes
* No
* Maybe

13. How much money do you saved for unexpected expenses? (Select one)

* Less than $1,000
* $1,000 - $5,000
* $5,000 - $10,000
* More than $10,000

14. Do you consistently carry an outstanding balance on your credit card? (Select one)

* Yes
* No

**Section 3: Financial Support & Employer Benefits**

15. Do you believe that your employer cares about your financial wellbeing? (Select one)

* Yes
* No
* Maybe

16. Do you think your salary/compensation is keeping up with the rising cost of living? (Select one)

* Yes
* No
* Maybe

17. Do you understand employer benefit and savings plans and their role in financial wellbeing? (Select one)

* Yes
* No
* Maybe

18. My employer’s financial wellness program has helped me: (Select all that apply)

* Prepare for retirement
* Get my spending under control
* Pay off debts/loans
* Save for major goals
* Manage investments
* Manage healthcare expenses
* Other (please specify): \_\_\_\_\_\_\_\_\_\_\_\_\_
* None of these

19. What employer benefits/tools would help you reduce financial stress?   
(Select all that apply)

* Unbiased financial counseling
* Loan assistance
* Identity theft protection
* Legal guidance
* Help managing cash and debt
* Understanding medical bills/managing healthcare costs
* Investment/retirement planning
* Other (please specify): \_\_\_\_\_\_\_\_\_\_\_\_
* None

20. Which of the following resources do you trust most for financial advice? (Select one)

* Friends and/or family
* Independent financial planner
* Investment advisor
* Attorney
* Accountant
* Insurance agent
* Online resources
* Other (please specify): \_\_\_\_\_\_\_\_
* None

21. When are you most likely to seek financial help? (Select one)

* When making major financial decisions
* During a financial crisis
* During major life events
* Never, I handle my own finances
* Ongoing, as I have a financial advisor
* Other (please specify): \_\_\_\_\_\_\_\_\_\_\_

22. On a scale of 1-10, how would you rate your current financial wellbeing?   
(1 - Very poor, 10 = Excellent)

23. Do you have suggestions on how our organization can better support your financial wellbeing? (Optional)