

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

Financial Wellbeing Survey (cont.)

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

Financial Wellbeing Survey (cont.)

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

Financial Wellbeing Survey (cont.)

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

Financial Wellbeing Survey (cont.)

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)