

# Women's Financial Education Series

## Final Evaluation Form

Name of organizations cosponsoring WFES \_\_\_\_\_

Workshop \_\_\_\_\_ Today's date \_\_\_\_\_

### WFES Program

1. How did you **first** hear about the Women's Financial Education Series? (Circle only one.)
  - a. Newspaper
  - b. Radio
  - c. Brochure
  - d. Friend
  - e. AARP meeting
  - f. Television
  - g. Other (please specify) \_\_\_\_\_
  
2. Why did you decide to attend the Program? (Circle only one.)
  - a. I've never managed money/finances/bills before, but I must now (or I may soon have to).
  - b. I'm handling my money/monthly expenses, everyday bills, etc., but I want to learn more.
  - c. I need long-range financial planning skills dealing with such steps as investments, retirement and estate planning, etc.
  - d. Other (please specify) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Which sessions did you attend? (Please circle Yes or No for each session.)

1. Getting Organized	Yes	No
2. Banking and Credit	Yes	No
3. Estate Planning	Yes	No
4. Insurance/Retirement Basics	Yes	No
5. Investing for Retirement	Yes	No



County \_\_\_\_\_ Month \_\_\_\_\_ Year \_\_\_\_\_

## Financial Feelings

A. Perhaps your feelings about managing your finances have been changing during your participation in the Women's Financial Education Series. *Circle the number that best describes your feelings.*

1. I feel more positive about managing my finances because \_\_\_\_\_

\_\_\_\_\_

2. My feelings have not changed.

3. I feel worse about managing my finances because \_\_\_\_\_

\_\_\_\_\_

B. Please indicate below how you feel about your current financial situation as a result of your participation in this program. *Circle the response that best indicates your feelings.*

### Financial Management

- |   |       |        |          |
|---|-------|--------|----------|
| 1. I feel more confident about managing my money. | Agree | Unsure | Disagree |
| 2. I am less anxious about my personal finances.  | Agree | Unsure | Disagree |
| 3. I feel better about the way I spend money.     | Agree | Unsure | Disagree |

### Financial Decision Making

- |  |       |        |          |
|--|-------|--------|----------|
| 4. I feel better about my financial decisions and ability to set priorities.           | Agree | Unsure | Disagree |
| 5. I feel more comfortable seeking financial information and/or assistance, if needed. | Agree | Unsure | Disagree |
| 6. I feel more confident about solving my financial problems.                          | Agree | Unsure | Disagree |

### Financial Goals

- |   |       |        |          |
|---|-------|--------|----------|
| 7. I feel I can better identify my financial goals.                                 | Agree | Unsure | Disagree |
| 8. I am more confident in my ability to achieve my financial goals.                 | Agree | Unsure | Disagree |
| 9. I believe I can more positively affect my future financial position (net worth). | Agree | Unsure | Disagree |

## Financial Practices

*Circle the numbers* in each section below that correspond to the statements that best describe what you have accomplished as a result of your participation in the Women's Financial Education Series.

- 1 = accomplished before you attended WFES
- 2 = accomplished during time you have attended the WFES
- 3 = in process of doing
- 4 = plan to do
- 5 = do NOT plan to do

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### A. Your Accomplishments

#### 1. Getting organized

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| a. Established financial goals and set target dates | 1 | 2 | 3 | 4 | 5 |
| b. Developed or updated net worth statement         | 1 | 2 | 3 | 4 | 5 |
| c. Prepared or updated household inventory          | 1 | 2 | 3 | 4 | 5 |
| d. Set up a filing system                           | 1 | 2 | 3 | 4 | 5 |

#### 2. Cash Flow

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| a. Developed or revised a spending plan                 | 1 | 2 | 3 | 4 | 5 |
| b. Prepared a cash-flow statement                       | 1 | 2 | 3 | 4 | 5 |
| c. Started or added to an emergency/reserve fund        | 1 | 2 | 3 | 4 | 5 |
| d. Identified and/or reduced money leaks<br>in spending | 1 | 2 | 3 | 4 | 5 |

#### 3. Banking and Credit

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| a. Evaluated my financial institution/accounts                    | 1 | 2 | 3 | 4 | 5 |
| b. Decided where to invest my reserve fund                        | 1 | 2 | 3 | 4 | 5 |
| c. Obtained credit in my own name                                 | 1 | 2 | 3 | 4 | 5 |
| d. Limited use and/or reduced balances on credit<br>card accounts | 1 | 2 | 3 | 4 | 5 |
| e. Obtained a copy of my credit report                            | 1 | 2 | 3 | 4 | 5 |
| f. Have sought help to resolve credit problems                    | 1 | 2 | 3 | 4 | 5 |

#### 4. Insurance

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| a. Assessed adequacy of my insurance coverage                                   | 1 | 2 | 3 | 4 | 5 |
| b. Comparison shopped for the best insurance coverage                           | 1 | 2 | 3 | 4 | 5 |
| c. Reviewed and/or updated ownership and beneficiaries<br>of insurance policies | 1 | 2 | 3 | 4 | 5 |
| d. Purchased / dropped additional insurance                                     | 1 | 2 | 3 | 4 | 5 |

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4 = plan to do  
 5 = do NOT plan to do

5. Estate Planning

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| a. Reviewed or executed estate planning documents (will, living will, durable power of attorney, trust, or property titles) and made any needed changes | 1 | 2 | 3 | 4 | 5 |
| b. Spoke to family members about my healthcare wishes   | 1 | 2 | 3 | 4 | 5 |
| c. Analyzed my financial situation in case of widowhood, death or divorce   | 1 | 2 | 3 | 4 | 5 |

6. Investing for Retirement/Retirement Fundamentals

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| a. Determined retirement and/or future income needs and how to meet them                            | 1 | 2 | 3 | 4 | 5 |
| b. Obtained an estimate of my future Social Security  | 1 | 2 | 3 | 4 | 5 |
| c. Decided where I want to invest my retirement fund  | 1 | 2 | 3 | 4 | 5 |
| d. Reviewed my 401k, IRA, or other retirement plans/ accounts to see if any changes need to be made | 1 | 2 | 3 | 4 | 5 |
| e. Set up direct payment to help me save and invest on a regular basis (monthly or quarterly)       | 1 | 2 | 3 | 4 | 5 |
| f. Re-evaluated what my retirement might look like and when I can afford to retire                  | 1 | 2 | 3 | 4 | 5 |

**B. Other Individual Accomplishments/Actions**

Please identify any additional financial practices that you have done or plan to do as a result of participating in the Women’s Financial Education Series.

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**C. Please circle any additional areas** other than those related to managing your finances where empowerment skills have helped you to take charge of your life.

1. Medical staff (doctors, nurses)
2. Salespeople or solicitors
3. Adult children
4. Other family members/friends
5. Service people (travel agents, waiters, cashiers)
6. Other (please describe)\_\_\_\_\_

**D.** We welcome **other comments** you would like to tell us about how the WFES sessions helped you to take charge of your finances and your life. (If you wish, you may use a separate sheet of paper and include your written comments with this completed survey.)

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**E. Personal Data**

1. Your age (Circle one.)

- |          |                |
|----------|----------------|
| a. 18-24 | e. 55-64       |
| b. 25-34 | f. 65-74       |
| c. 35-44 | g. 75-84       |
| d. 45-54 | h. 85 or older |

2. Race (Circle one.)

- |                     |                           |
|---------------------|---------------------------|
| a. White            | d. Asian                  |
| b. African American | e. Native American Indian |
| c. Hispanic         | f. Other _____            |

3. Marital status (Circle one.)

- |             |                           |
|-------------|---------------------------|
| a. married  | d. single - never married |
| b. widowed  | e. separated              |
| c. divorced |                           |

4. Education (Please circle highest level of education completed.)

- a. Less than High School
- b. Some High School
- c. High School Diploma or GED
- d. Technical or Vocational Certificate
- e. Some College/Associate Degree
- f. Undergraduate Degree
- g. Masters Degree
- h. Doctorate Degree

7. Personal income before taxes, including wages, Social Security, pensions, interest, dividends, etc. (Circle only one.)

- |                    |                     |
|--------------------|---------------------|
| a. \$0-5,999       | d. \$18,000-23,999  |
| b. \$6,000-11,999  | e. \$24,000-39,999  |
| c. \$12,000-17,999 | f. \$40,000 or more |

8. Total combined annual income for all members of your household, before taxes, including wages, Social Security, pensions, interest, dividends, etc. (for example, total for you and your spouse)

- |                      |                       |
|----------------------|-----------------------|
| a. 0 - \$5000        | f. \$40,000 – 49,999  |
| b. \$6000 – 11,999   | g. \$50,000 – 59,999  |
| c. \$12,000 – 17,999 | h. \$60,000 – 69,999  |
| d. \$18,000 – 23,999 | i. \$70,000 – 99,999  |
| e. \$24,000 – 39,999 | j. \$100,000 and over |