Lichtenberg

OLDER ADULT NEST EGG

Name:

Age:

Gender:

Education Level:

Is your memory less reliable than 1 year ago?

Do you live alone?

Reed Financial group

Financial Vulnerability Survey

Q1 How worried are you about having enough money to pay for things?

A) Not worried at all B) Somewhat worried C) Very worried

Notes:

Q2 Overall, how satisfied are you with your finances?

A) Satisfied B) Neither satisfied nor dissatisfied C) Dissatisfied

Notes:

Q3 Who manages your money day-to-day?

A) I do, without any help B) I get help from someone C) Someone else manages all my money

Notes:

Q4 How satisfied are you with this money management arrangement?

A) Satisfied B) Neither satisfied nor dissatisfied C) Dissatisfied

Notes:

Q5 How confident are you in making big financial decisions?

A) Confident B) Unsure C) Not Confident

Notes:

Q6 How often do you worry about financial decisions you've recently made?

A) Never or Rarely B) Sometimes C) Often

Notes:

Q7 Have you noticed any money taken from your bank account without your permission?

A) Yes B) No

Notes:

Q8 How often do your monthly expenses exceed your regular monthly income?

A) Never or Rarely B) Sometimes C) Often

Notes:

Q9 How often do you talk with or visit others on a regular basis?

A) Daily or Weekly B) Monthly C) Less than monthly

Notes:

Q10 How often do you wish you had someone to talk to about financial decisions, transactions, or plans?

A) Never or Rarely B) Sometimes C) Often

Notes:

Q11 How often do you feel anxious about your financial decisions and/or transactions?

A) Never or Rarely B) Sometimes C) Often

Notes:

Q12 Do you have a confidante with whom you can discuss anything, including your financial situations and decisions?

A) Yes B) No

Notes:

Q13 How often do you feel downhearted or blue about your financial situation or decisions?

A) Never or Rarely B) Sometimes C) Often

Notes:

Q14 Are your memory, thinking skills, or ability to reason with regard to financial decisions or financial transactions worse than a year ago?

A) Yes B) No

Notes:

Q15 Has a relationship with a family member or friend become strained due to finances as you have gotten older?

A) Yes B) No

Notes:

Q16 Did anyone ever tell you that someone else you know wants to take your money?

A) Yes B) No

Notes:

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