



Class Name: _____

Date: _____

1. What is the first letter of your first name? _____
2. What is the first letter of your last name? _____
3. What is the number of the month you were born in? _____

Please circle your answer for each of the following questions.

- | | | |
|--|------|-------|
| 1. A financial plan includes spending targets and savings goals. | TRUE | FALSE |
| 2. Writing a check for paying bills can be more convenient and safe than paying with cash. | TRUE | FALSE |
| 3. Checking account fees are taken from a person's checking account by the bank automatically. | TRUE | FALSE |
| 4. You do not need to keep track of ATM withdrawals and deposits, in your checkbook or budget. | TRUE | FALSE |
| 5. Savings and checking accounts serve the same purpose, so it does not make sense to have both. | TRUE | FALSE |
| 6. If a check is written for more money than is in the checking account, the bank or credit union will typically charge you a fee. | TRUE | FALSE |
| 7. Financial institutions like banks and credit unions may charge a fee to have a checking account; however some do not charge any fee. | TRUE | FALSE |
| 8. To open a bank account, a government issued photo ID is required (for example a drivers license, passport, state ID card, military ID card, or Matricular Consular Card). | TRUE | FALSE |
| 9. Predatory lending means taking unfair advantage of consumers who need borrow money. | TRUE | FALSE |
| 10. At the end of a rent-to-own contract, many consumers have spent three times the amount of the original purchase price of the item. | TRUE | FALSE |

Please circle the number that best describes:

Your confidence to:	Not confident	A little confident	Somewhat Confident	Confident	Very Confident
1. Open an account at a bank or credit union.	1	2	3	4	5
2. Compare banks and credit unions available to you.	1	2	3	4	5
3. Ask what the APR is on current or new loans.	1	2	3	4	5
4. Compare the price of money orders of different businesses.	1	2	3	4	5
5. Ask what the fees are new bank accounts.	1	2	3	4	5

Do you currently:	No	Maybe	Yes	Already Doing This	Does not Apply
1. Open an account at a bank or credit union.	1	2	3	4	5
2. Compare banks and credit unions available to you.	1	2	3	4	5
3. Ask what the APR is on current or new loans.	1	2	3	4	5
4. Compare the price of money orders of different businesses.	1	2	3	4	5
5. Ask what the fees are new bank accounts.	1	2	3	4	5



Student Initials _____
 Class Name: _____
 Date: _____

Please rate the following program:

	Not Helpful	Somewhat Helpful	Helpful	Very Helpful
Instructor	1	2	3	4
Educational Materials	1	2	3	4
Overall Program	1	2	3	4

Please circle the answer to the following questions:

- | | | |
|--|------|-------|
| 1. All financial institutions offer the same services. | TRUE | FALSE |
| 2. Writing a check for paying bills can be more convenient and safe than paying with cash. | TRUE | FALSE |
| 3. Checking account fees are taken from a person's checking account by the bank automatically. | TRUE | FALSE |
| 4. You do not need to keep track of ATM withdrawals and deposits, in your checkbook or budget. | TRUE | FALSE |
| 5. Savings and checking accounts serve the same purpose, so it does not make sense to have both. | TRUE | FALSE |
| 6. If a check is written for more money than is in the checking account, the bank or credit union will typically charge you a fee. | TRUE | FALSE |
| 7. Financial institutions like banks and credit unions may charge a fee to have a checking account; however some do not charge any fee. | TRUE | FALSE |
| 8. To open a bank account, a government issued photo ID is required (for example a drivers license, passport, state ID card, military ID card, or Matricular Consular Card). | TRUE | FALSE |
| 9. Predatory lending means taking unfair advantage of consumers who need borrow money. | TRUE | FALSE |
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Basic Banking Program Information Sheet

Program Date(s): _____

Instructor(s): _____

Instructor(s) _____

Contact Info: _____

Program Location: _____

Number of Participants: _____

Topics covered during the workshop (check all that apply):

- | | |
|-----------------------------|---|
| 1. Consumer Decision Making | 7. Retirement and Estate Planning |
| 2. Budgeting | 8. Consumer Protection and Identity Theft |
| 3. Cash Flow Management | 9. Risk Management and Insurance |
| 4. Savings and Investments | 10. Taxation |
| 5. Debt Management | 11. Other _____ |
| 6. Homeownership | 12. Other _____ |

Profile of participants (check all that apply):

- | | |
|----------------------------------|----------------------------|
| 1. General Public | 7. Elderly |
| 2. Low-to-moderate income | 8. Military |
| 3. Moderate-to-upper income | 9. Financial Professionals |
| 4. Children and Youth | 10. Teachers/Educators |
| 5. Young adults/College students | 11. Other _____ |
| 6. Baby-boomer | 12. Other _____ |

What delivery methods do you use? (check all that apply):

- | | |
|------------------------------------|-------------------------------------|
| 1. Workshop/Seminar | 5. Printed materials |
| 2. Multi-session course | 6. Electronic materials such as CDs |
| 3. One-on-one financial counseling | 7. Long-distance education |
| 4. Internet | 8. Other _____ |

What financial education curricula and resources were shared with program participants?

Were there any particularly useful or interesting comments made by the program participants?