



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. A budget will help make decisions about how much to spend and save. | TRUE | FALSE |
| 3. The total amount allocated in a budget equals the total income that someone receives. | TRUE | FALSE |
| 4. Budgets don't need to be flexible; once the amounts are decided they should never be changed. | TRUE | FALSE |
| 5. Comparing the price of the same item at different stores is typically not worth the time it takes. | TRUE | FALSE |
| 6. Usually many people can use the same budget to meet their financial goals. | TRUE | FALSE |
| 7. A financial plan is based on what a person values. | TRUE | FALSE |
| 8. It is bad to want nice things. | TRUE | FALSE |
| 9. Spending plans reflect choices based on values, goals, and resources. | TRUE | FALSE |
| 10. Bad financial decisions only affect the person who made the decision. | TRUE | FALSE |

Please circle the number that best describes:

Your confidence to:	Not confident	A little confident	Somewhat Confident	Confident	Very Confident
1. Pay bills on time.	1	2	3	4	5
2. Write out a spending plan.	1	2	3	4	5
3. Keeping track of when bills are due (billing cycles).	1	2	3	4	5
4. Pay required expenses first, before any other expenses.	1	2	3	4	5
5. Categorize expenses to understand personal spending patterns.	1	2	3	4	5

Do you currently:	No	Maybe	Yes	Already Doing This	Does not Apply
1. Pay bills on time.	1	2	3	4	5
2. Write out a spending plan.	1	2	3	4	5
3. Keeping track of when bills are due (billing cycles).	1	2	3	4	5
4. Pay required expenses first, before any other expenses.	1	2	3	4	5
5. Categorize expenses to understand personal spending patterns.	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. A financial plan includes spending targets and savings goals. | TRUE | FALSE |
| 2. A budget will help make decisions about how much to spend and save. | TRUE | FALSE |
| 3. The total amount allocated in a budget equals the total income that someone receives. | TRUE | FALSE |
| 4. Budgets don't need to be flexible; once the amounts are decided they should never be changed. | TRUE | FALSE |
| 5. Comparing the price of the same item at different stores is typically not worth the time it takes. | TRUE | FALSE |
| 6. Usually many people can use the same budget to meet their financial goals. | TRUE | FALSE |
| 7. A financial plan is based on what a person values. | TRUE | FALSE |
| 8. It is bad to want nice things. | TRUE | FALSE |
| 9. Spending plans reflect choices based on values, goals, and resources. | TRUE | FALSE |
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Please circle the number that best describes:

Your confidence to:	Not confident	A little confident	Somewhat Confident	Confident	Very Confident
1. Pay bills on time.	1	2	3	4	5
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3. Keeping track of when bills are due (billing cycles).	1	2	3	4	5
4. Pay required expenses first, before any other expenses.	1	2	3	4	5
5. Categorize expenses to understand personal spending patterns.	1	2	3	4	5

As a result of this program do you plan to:	No	Maybe	Yes	Already Doing This	Does not Apply
1. Pay bills on time.	1	2	3	4	5
2. Write out a spending plan.	1	2	3	4	5
3. Keeping track of when bills are due (billing cycles).	1	2	3	4	5
4. Pay required expenses first, before any other expenses.	1	2	3	4	5
5. Categorize expenses to understand personal spending patterns.	1	2	3	4	5



Budgeting 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?