The following questions are about planning for retirement.

How often have you…

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Never  (1) | One time (2) | Two to three times (3) | Four or more times  (4) |
| 1. thought about the age you expected to retire? | ☐ | ☐ | ☐ | ☐ |
| 1. thought about how much money you needed to save for retirement? | ☐ | ☐ | ☐ | ☐ |
| 1. read in a brochure, magazine, or book about how to plan for retirement? | ☐ | ☐ | ☐ | ☐ |
| 1. read on the Web/internet about how to plan for retirement? | ☐ | ☐ | ☐ | ☐ |
| 1. talked to a family member or a close friend about how to plan for retirement? | ☐ | ☐ | ☐ | ☐ |
| 1. talked to a finance professional about how to plan for retirement? | ☐ | ☐ | ☐ | ☐ |
| 1. attended a workshop or class about financial planning for retirement? | ☐ | ☐ | ☐ | ☐ |

How much do you know about…

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Nothing  at all  (1) | A little  (2) | Somewhat  (3) | A great deal  (4) |
| 1. how retirement savings accounts work? | ☐ | ☐ | ☐ | ☐ |
| 1. different types of retirement savings plans? | ☐ | ☐ | ☐ | ☐ |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Not prepared  at all  (1) | A little prepared  (2) | Somewhat prepared  (3) | Very prepared  (4) |
| 1. How well prepared financially are you for retirement? | ☐ | ☐ | ☐ | ☐ |