



Financial Wellness Survey

	YES	NO
1. Do you think you will be able to retire when you want to?		
2. Do you believe you are currently saving enough to achieve financial independence and attain a comfortable retirement lifestyle in the future?		
3. Do you feel you will have an adequate amount saved for retirement?		
4. Are you currently participating in my company's 401(k) or retirement fund?		
5. Do you have an emergency fund that can incur a \$1,000 unexpected expense?		
6. Do you feel that financial stress is affecting your job or relationships?		
7. Are you happy with your current financial situation?		
8. My financial situation causes to stress at more than a normal level.		
9. Do you enjoy life because of the way I manage money?		
10. Are you concerned that the money you have or save won't last?		
11. Do you struggle to pay your monthly bills?		
12. Do you have money left over at the end of the month?		
13. Do you have a monthly budget and stick with it?		
14. Do you lose sleep over finances?		
15. Do you believe you financial situation will impact your job performance?		
16. Do you feel your employer cares about your financial well-being?		