1. Were you ever formally introduced to the concept of wealth and how to build wealth? (for example, by your parents, a relative, or a teacher?)
   a. If so, how old where you the first time you remember someone talking to you about wealth?
   b. Did your parents informally discuss household finances with you growing up?
   c. Do you know if your parents had any sort of savings or financial account for you as a child?

2. How comfortable do you feel making your own investment decisions?
   a. What are your concerns and/or fears?
   b. How do you feel about taking financial risks (such as investing in the stock market)?
   c. Do you have any stocks/bonds? If so, how much do you invest?

3. Who, if anyone, do you discuss your financial matters with?

4. Have you ever consulted a professional financial counselor?
   a. If so:
      i. How old were you when you first met with them?
      ii. Do you still consult with one?
      iii. How often do you consult with them?
   b. If not, why not?
   c. Do you know if you have free access to professional financial counselor through your employer?

5. For those who are married and/or cohabitating: how do you split up responsibility for household finances?
   a. Does one person take charge of certain aspects (like bill paying, savings plans, etc)?

6. If you were to lose your main source of income, could you cover your expenses for 3 months by:
   a. Using savings
   b. Borrowing money from a bank or other [institution, formal lender]
   c. Borrowing money from friends/family
   d. Selling assets
   e. Don’t know

7. What are your largest debts/bills?

8. Do you feel you are on track for accumulating enough savings for retirement?
   a. If so, why?
      i. Do you have a employer provided retirement account/pension, other savings, stocks and bonds, etc?
b. If not, why not? (eg: child care, paid leave, lack of health insurance)

9. Do you have a set schedule for work or have some control over the hours that you work?
   a. If you don’t have a set schedule, how much notice do you get for schedule changes?

10. Thinking back on your life, have there been any major events that you feel have kept you from accumulating wealth the way you would have liked to?
    a. Having children/high cost of child care?
    b. Divorce
    c. School debt
    d. Major medical issues
    e. Other

If you have children:

11. Do you discuss household finances with your children?

12. Do you have any sort of savings account for them?
    a. If so, how much?
       i. Don’t know

13. Have you ever taken out loans to pay for school for your child/children?

14. Have you taken out loans to pay for school for your child/children in the past 12 months?

15. Do you plan to take out loans to pay for college for your child/children?
1. Do you identify as:
   a. Female
   b. Male
   c. Transgender
   d. Unspecified/nonconforming
   e. Prefer not to answer

2. Would you say that you are: (Check one)
   a. Heterosexual or straight
   b. Gay or lesbian
   c. Bisexual
   d. Don’t know
   e. Prefer not to answer

3. Do you identify as (Select all that apply):
   a. American Indian or Alaska Native
   b. Asian/Asian American
   c. Native Hawaiian/Pacific Islander
   d. Black/African American
   e. Hispanic or Latino/a
   f. White
   g. Other race/ethnicity
   h. Prefer not to answer

4. What best describes your current living arrangements? (Choose one)
   a. Single, never married
   b. Married
   c. Separated/Divorced/Widowed
   d. Living with a partner/Cohabitating
   e. Other

5. Do you have children?
   a. Yes
      i. How many children do you have? ______
      ii. How many of your children are under age 6? ______
      iii. How many of your children are between the ages of 6 and 17? ______
   b. No
   c. Prefer not to answer
6. Which of the following best describes your current status? (Check all that apply)
   a. Employed full-time
   b. Employed part-time
   c. Unemployed and looking for work
   d. Retired
   e. A student
   f. A homemaker not working outside the home
   g. Other __________________________
   h. Prefer not to answer

7. What is your highest level of school completed?
   a. Some high school or less (Grades 1-11)
   b. High School diploma or GED/high school equivalency
   c. Vocational school/training
   d. Some college
   e. Two-year college degree
   f. Four-year college or university degree
   g. Graduate or professional school
   h. Doctoral degree