

## City of XX 2014 Financial Wellness Questionnaire

**Instructions:** For each of the statements below, put an “X” through the box that best describes your level of agreement.

<b>General</b>	<b>Strongly Agree</b>	<b>Agree</b>	<b>Neither Agree nor Disagree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>
1. I understand my financial needs.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I am confused by financial issues.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I avoid thinking about money, retirement and my financial future.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I am satisfied with my overall financial situation.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>Planning</b>	<b>Strongly Agree</b>	<b>Agree</b>	<b>Neither Agree nor Disagree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>
5. I have an emergency fund with three to six months of living expenses saved.....	Yes <input type="checkbox"/>	No <input type="checkbox"/>			
6. I am taking the following steps to meet my retirement goals. Please select all that apply.....					
I review my quarterly plan statements.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have an annual meeting with my ICMA representative...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I rebalance my account at least annually.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I meet with my own financial advisor.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have additional outside investments.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I contribute to the 457 Deferred Compensation Plan ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I contribute to the Roth IRA Plan ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Are you confident that you will meet your financial goals...?	Yes <input type="checkbox"/>	No <input type="checkbox"/>			
8. Did you know that ICMA-RC offers financial planning .....?	Yes <input type="checkbox"/>	No <input type="checkbox"/>			

<b>Retirement</b>	<b>Strongly Agree</b>	<b>Agree</b>	<b>Neither Agree nor Disagree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>
9. Based on my retirement savings habits, I am optimistic about my retirement security.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Once I retire from my primary employer, I intend to work in retirement.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. What percentage of your current income do you expect to replace in retirement through pensions and savings.....	50-70% <input type="checkbox"/>	71-85% <input type="checkbox"/>	86-100% <input type="checkbox"/>	Over 100% <input type="checkbox"/>	

**ICMA-RC Experience**

**Strongly Agree**      **Agree**      **Neither Agree nor Disagree**      **Disagree**      **Strongly Disagree**

- 12. ICMA-RC’s web site is well designed and easy to navigate.....
  
- 13. ICMA-RC is accessible to me through many different ways such as via the Internet, telephone, and/or in person
  
- 14. I receive quality of service from Doug Meyer’s on-site meetings.....
  
- 15. I receive quality service from Andrea Biel’s, CFP® on-site meetings .....
  
- 16. Have you attended a financial seminar in the past 12 months?      Yes       No
  
- 17. Was the seminar’s location convenient for you?      Yes       No
  
- 18. If you “Disagree” or Strongly Disagree” to any items above, indicate what ICMA-RC’s services did not meet your needs? \_\_\_\_\_  
\_\_\_\_\_

**Demographic Information**

- 19. Please check the box that indicates your current age.  
Under 30       30 – 40       41 - 50       Over 50
  
- 20. Please check the box that indicates your gender.      Female       Male
  
- 21. Please check the box that indicates your current annual salary:  
Under \$40k       \$40k - \$60k       Over \$60k
  
- 22. What educational tools/seminars would you like to see in the next two years?  
401(a) Plan Review       Plan Enrollment Process       Pre-Retirement Planning       Saving for Retirement       On-line information and functionality       Other  \_\_\_\_\_
  
- 23. Would you be interested in participating in an Educational Design sub-committee? If yes, email Janie Appleton.
  
- 24. If you would like to meet with an ICMA-RC representative, call or email Janie to setup a meeting time.

*Thank you for your participation in this survey.  
The results will help us enhance our retirement education strategy.*