

Employee Financial Wellness Program Survey

1. Which of the following would most improve your financial well-being? (Choose up to three)

- Being able to cover my usual expenses and pay my bills on time
- Paying my credit card balance in full each month
- Increasing my income
- Having a more stable work schedule
- Managing my debt
- Having access to loans
- Making my student loan payments
- Building emergency savings
- Improving my credit score
- Covering my out-of-pocket medical expenses

2. If you have looked at your credit score in the last year, how satisfied are you with your most recent credit score? (Select only one)

- Very
- Somewhat
- Not at all
- Haven't looked in the past year
- Have never looked at my credit score

3. If you did not receive any income next month, how much would this impact your ability to cover your usual expenses?

- Not at all
- Very little
- Somewhat
- Very much
- Greatly

4. Imagine you have an emergency expense that costs \$400. Based on your current financial situation, how would you pay for the expense? Please select all options that apply:

- Put it on my credit card and pay it off in full for the next statement
- Put it on my credit card and pay it off over time

- Pay with the money currently in my checking/savings account or with cash
- Borrow money from a friend or family member
- Use a payday loan
- Sell something
- I wouldn't be able to pay for the expense right now
- Other (please specify)

5. In the past six months, have you struggled to cover the cost of any of the following? Please select all options that apply:

- Food
- Housing
- Healthcare
- Transportation
- Child care or care for another person in your household
- Legal fees
- Other (please specify)
- None

6. Which of the following statements best describes how you feel about your immediate finances and your work as an employee:

- I am not worried about my immediate finances, so it doesn't affect my work
- I worry about my immediate finances, but it doesn't affect my work
- I worry about immediate finances, which affects my work

7. Which of the following statements best describes how you feel about your long-term finances and your work as an employee:

- I am not worried about my long-term finances, so it doesn't affect my work
- I worry about my long-term finances, but it doesn't affect my work
- I worry about long-term finances, which affects my work

8. How much do you agree with the following statements?

- ***I feel that my employer generally cares about my financial well-being***

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree

- ***I feel that my employer's benefits are competitive compared to those offered at other organizations***

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree

9. What do you think your employer could do to best support your financial well-being? [Open-ended response]

10. Additional question that addresses differences in positions

Create your own question here that asks employees what group they are in.

Think about how sub-group data could help in understanding your employees' financial well-being. Some employers have used wage ranges, job categories, or exempt/nonexempt status.

*Examples:

- ***Please identify your work group:***

- Restaurant Staff
- Maintenance Crew
- Housekeeping

- ***Please choose one:***

- I am paid hourly
- I am paid a salary

- ***Please choose your pay range:***

- \$13-\$15 per hour
- \$16-\$18 per hour
- Salaried