

Name _____

(8) QUICK QUESTIONNAIRE

1. Are you planning any major purchase in the next 12 months?

House Car Furniture Vacation Other(s) _____

2. Do you anticipate any of the following life changes of the next 12 months?

Marriage Marital separation Major medical New baby
 Inheritance Legal issues Other(s) _____

3. Do you anticipate any of the following employment changes in the next 12 months?

Raise/promotion Lay-off Other _____

4. How secure is your current employment situation?

Strong Poor Fair Don't Know

5. How strong is your desire to change or advance your employment condition?

Actively looking Considering a job change Not considering a job change

6. Do you have a retirement plan through your work or on your own? Yes No

(If yes) What kind of retirement plan do you have? _____

7. Are you currently pursuing any training to increase your employment and/or income opportunities?

Yes, in _____ No

8. Do you have any debt issues? Yes No (If yes) What is the amount of your debt? \$ _____

9. How much would you like to have saved for emergencies? \$ _____ How much do you have saved? \$ _____

10. For each of the following, check off what you DO have.

Self health insurance disability insurance life insurance a will
Spouse health insurance disability insurance life insurance a will
Children health insurance disability insurance life insurance

11. Do you own your own home?

Yes No Do you have homeowner's or renter's insurance?

12. Do you have Internet access?

Yes, AND I feel very comfortable using the Internet
 Yes, BUT I do NOT feel very comfortable using the Internet
 No, I do not have Internet access

13. How do you like to learn? (Check ALL that apply)

Printed materials - I like to have things I can read and go through on my own
 Internet websites - I like to find and read materials from the Internet
 Individual instruction - I like to have someone go over things with me one-on-one
 Classroom training or seminars - I like to learn with a group of people