

Young Investor Education Pre-Training Survey

How confident are you that you can teach the following topics? Please circle a number, using a range of 1 to 5 with 1 indicating ‘Not Confident’ and 5 ‘Very Confident’.

	Not Confident			Very Confident	
Getting motivated to save and invest	1	2	3	4	5
How to find money to invest	1	2	3	4	5
Identifying different investment options	1	2	3	4	5
Assessing and managing investment risks	1	2	3	4	5
Setting investment goals	1	2	3	4	5
Selecting the best investment option	1	2	3	4	5
Working with a financial professional	1	2	3	4	5
Protecting your investment against fraud	1	2	3	4	5
Selling the idea of investor education to employers	1	2	3	4	5

How familiar are you with the following topics? Please circle a number, using the range of 1 to 5 with 1 indicating ‘Not Familiar’ and 5 ‘Very Familiar’.

	Not Familiar			Very Familiar	
Savings options	1	2	3	4	5
Investment options	1	2	3	4	5
Retirement options	1	2	3	4	5
Allocating assets within an investment fund	1	2	3	4	5
Evaluating an investment opportunity	1	2	3	4	5
Short and long term investment goals	1	2	3	4	5
Types of financial professionals	1	2	3	4	5
Investment fraud	1	2	3	4	5
Mutual funds	1	2	3	4	5
Stocks	1	2	3	4	5
Bonds	1	2	3	4	5
Fixed investments	1	2	3	4	5
Reading the investment pages	1	2	3	4	5

On a scale of 1 to 5, with 1 indicating 'Disagree' and 5 'Agree,' please indicate the extent to which you disagree or agree with the following statements

	Disagree			Agree	
The training was a good use of my time	1	2	3	4	5
The purpose of the training was clear	1	2	3	4	5
I understand the overall goals of this project	1	2	3	4	5
I understand what is expected of me in this project	1	2	3	4	5
I have a clear idea of how I will implement this project	1	2	3	4	5
I have adequate materials and support to effectively teach these concepts	1	2	3	4	5
I will be able to use the training materials provided	1	2	3	4	5
I am excited about moving forward with this project	1	2	3	4	5
I learned a lot about investor education topics	1	2	3	4	5

What did you like best about the training? _____

How could the training be improved? _____

Thank you for your response!