

Feedback Please!

Please rate each criteria before and after the sessions:

| Before the sessions | | After the sessions |
|---|---|---|
| Poor 1 2 3 4 5 Good | My financial management skills | Poor 1 2 3 4 5 Good |
| Poor 1 2 3 4 5 Good | My skill in making a spending plan. | Poor 1 2 3 4 5 Good |
| Poor 1 2 3 4 5 Good | My skill in determining my net worth. | Poor 1 2 3 4 5 Good |
| Not aware 1 2 3 4 5 Aware | My awareness of the importance of starting to save and invest early in life. | Not aware 1 2 3 4 5 Aware |
| Not confident 1 2 3 4 5 Confident | My confidence that I can find money to save or invest. | Not confident 1 2 3 4 5 Confident |
| Not confident 1 2 3 4 5 Confident | My confidence that I can build wealth. | Not confident 1 2 3 4 5 Confident |
| Not confident 1 2 3 4 5 Confident | Became more motivated to begin or increase contributions to savings and/or investment plans. | Not confident 1 2 3 4 5 Confident |
| Poor 1 2 3 4 5 Good | My understanding of the difference between pre-tax and after-tax investments. | Poor 1 2 3 4 5 Good |
| Poor 1 2 3 4 5 Good | My ability to identify appropriate types of savings and investments for different financial goals. | Poor 1 2 3 4 5 Good |
| Poor 1 2 3 4 5 Good | My understanding of how to reduce risk by diversifying assets. | Poor 1 2 3 4 5 Good |
| Poor 1 2 3 4 5 Good | My understanding of what changes I might need to make in asset allocation as I move through the life cycle. | Poor 1 2 3 4 5 Good |
| Poor 1 2 3 4 5 Good | My understanding of costs that might be associated with different investment options. | Poor 1 2 3 4 5 Good |
| Poor 1 2 3 4 5 Good | My understanding of the savings and retirement plan options available through my employer or a future employer. | Poor 1 2 3 4 5 Good |
| Poor 1 2 3 4 5 Good | My ability to identify different financial professionals with their preparation and qualifications. | Poor 1 2 3 4 5 Good |

As a result of this lesson:

- I plan to set different savings and/or investment goals.**
- I plan to begin or increase contributions to savings and/or investment plans.**
- I plan no change.**