



# CFPB Financial Well-Being Scale Assessment

## Part 1: How well does this statement describe you or your situation?

| This statement describes me   | Completely               | Very well                | Somewhat                 | Very little              | Not at all               |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1. I could handle a major unexpected expense  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. I am securing my financial future  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Because of my money situation, I feel like I will never have the things I want in life | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. I can enjoy life because of the way I'm managing my money                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. I am just getting by financially   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. I am concerned that the money I have or will save won't last                           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## Part 2: How often does this statement apply to you?

| This statement applies to me   | Always                   | Often                    | Sometimes                | Rarely                   | Never                    |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 7. Giving a gift for a wedding, birthday or other occasion would put a strain on my finances for the month | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. I have money left over at the end of the month  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. I am behind with my finances  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. My finances control my life  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## Part 3: Tell us about yourself.

|   |   |   |
|---|---|---|
| 11. How old are you?                    | <input type="checkbox"/> 18-61                | <input type="checkbox"/> 62+                              |
| 12. How did you take the questionnaire? | <input type="checkbox"/> I read the questions | <input type="checkbox"/> Someone read the questions to me |

