

Financial Management Evaluation

Please read each statement and place a check mark (✓) under:

Yes if you learned the information listed in each statement during this program

No if you did not learn the information listed in each statement during this program

Not Sure if you are not sure if you learned the information listed in each statement

Already Knew if you already knew the information listed in each statement before participating in this program

(Only put one check mark for each statement please)

During the _____ program, I LEARNED HOW TO:

	Yes	No	Not sure	Already knew
1. Develop a household budget	_____	_____	_____	_____
2. Develop a spending plan	_____	_____	_____	_____
3. Develop a savings plan	_____	_____	_____	_____
4. Keep track of spending	_____	_____	_____	_____
5. Write family financial goals	_____	_____	_____	_____
6. Develop a system for organizing family financial records	_____	_____	_____	_____
7. Prepare a net worth statement	_____	_____	_____	_____
8. Develop a household inventory	_____	_____	_____	_____
9. Write a will	_____	_____	_____	_____
10. Review my credit report	_____	_____	_____	_____
11. Review insurance policies to check value for coverage	_____	_____	_____	_____
12. Prepare a credit card safety record	_____	_____	_____	_____
13. Develop a system for paying bills	_____	_____	_____	_____
14. Develop a plan to reduce debt	_____	_____	_____	_____
15. Check on retirement benefits	_____	_____	_____	_____
16. Open a savings account	_____	_____	_____	_____

During the _____ program, I LEARNED TIPS FOR:

	Yes	No	Not sure	Already knew
17. Reducing impulse spending	_____	_____	_____	_____
18. Improving my credit rating	_____	_____	_____	_____
19. Decreasing my outstanding debt	_____	_____	_____	_____
20. Comparing prices to get the most for my money	_____	_____	_____	_____