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:

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:

17. Reducing impulse spending
18. Improving my credit rating
19. Decreasing my outstanding debt
20. Comparing prices to get the most for my money

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