



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. 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"/>
2. I am just getting by financially	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. 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
4. 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"/>
5. 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.

6. How old are you? 18-61 62+
7. How did you take the questionnaire? I read the questions Someone read the questions to me



Scoring worksheet

NAME OR NUMBER _____

1. Select the person’s answers, record the response value in the right hand column and add up the total values for each part of the questionnaire.

This statement describes me	Completely	Very well	Somewhat	Very little	Not at all	Response value
1. Because of my money situation, I feel like I will never have the things I want in life	0	1	2	3	4	
2. I am just getting by financially	0	1	2	3	4	
3. I am concerned that the money I have or will save won't last	0	1	2	3	4	
Part 1 subtotal:						

This statement applies to me	Always	Often	Sometimes	Rarely	Never	Response value
4. I have money left over at the end of the month	4	3	2	1	0	
5. My finances control my life	0	1	2	3	4	
Part 2 subtotal:						
Total response value:						

2. Find the financial well-being score

How old is the person?

18-61 62+

How did the person take the questionnaire?

Self-administered

Administered by someone else

Because scores vary based on age and how the questionnaire was administered, you must convert the total response value to a financial well-being score.

- Find the row that corresponds to the total response value.
- Follow that row across to the column that corresponds to the person's age and how the questionnaire was administered.
- Record the final score.

Financial well-being score:

Total response value	Questionnaire self-administered		Questionnaire administered by someone else	
	18-61	62+	18-61	62+
0	19	20	22	24
1	25	26	30	30
2	29	31	33	33
3	32	34	36	37
4	36	37	39	39
5	38	40	42	42
6	41	43	44	44
7	43	46	47	46
8	46	48	49	49
9	48	51	51	51
10	50	53	54	53
11	53	55	56	55
12	55	58	58	57
13	57	61	60	59
14	60	63	63	62
15	63	66	66	64
16	65	69	68	67
17	68	73	72	70
18	72	76	75	73
19	76	81	80	77
20	82	90	87	84

Learn more at consumerfinance.gov/financial-well-being