


**ELEMENTARY SCHOOL FINANCIAL CAPABILITY SURVEY**

# Your money journey results worksheet – Elementary school

This worksheet helps calculate students' results from the "Map your money journey – Elementary school" survey. Knowing your results can help you measure your current financial capability and plan for future growth.

## Instructions

- 1 Record your answer to each question in the survey in the "response value" column.
- 2 Add the values for each section of the survey (Part 1, Part 2, and Part 3) to get a subtotal for each section.
- 3 Add the subtotals from each section to get your results.



## Part 1.

While looking at your actual responses on the survey, record the value for that response in the right-hand column. Add the values to get your total for Part 1. Record your total.

|  | Most of the time | Sometimes | Rarely | I don't know | Response value |
|--|------------------|-----------|--------|--------------|----------------|
| 1. I make a plan for the things I will do this week.                                     | 5                | 4         | 3      | 2            |                |
| 2. I make a plan for the things I will do next week.                                     | 5                | 4         | 3      | 2            |                |
| 3. I check my schoolwork before handing it in.   | 5                | 4         | 3      | 2            |                |
| 4. If a math problem or a reading passage is hard, I read it over until I understand it. | 5                | 4         | 3      | 2            |                |
| 5. I finish my schoolwork on time.   | 5                | 4         | 3      | 2            |                |
| 6. I like to try new and exciting things, even if they are a little hard for me.         | 5                | 4         | 3      | 2            |                |

|   | (a) | (b) | (c) | (d) | Response value |
|---|-----|-----|-----|-----|----------------|
| 7. Imagine that you want to get a new game. What do you think about before you buy the game?  | 3   | 3   | 5   | 2   |                |
| 8. Imagine that you and your friend are at the store. You see a game you've been saving money for but you don't have enough to buy it yet. You learn the game will go on sale next weekend at a price you can afford. What will you do? | 3   | 5   | 3   | 2   |                |

**Part 1 total** \_\_\_\_\_



## Part 2.

While looking at your actual responses on the survey, record the value for that response in the right-hand column. Add the values to get your total for Part 2. Record your total.

|   | Very important | Somewhat important | Not important | I don't know | Response value |
|---|----------------|--------------------|---------------|--------------|----------------|
| 9. Save my money.   | 5              | 4                  | 3             | 2            |                |
| 10. Try not to spend all my money right away.                       | 5              | 4                  | 3             | 2            |                |
| 11. Set goals for how to spend my money.                            | 5              | 4                  | 3             | 2            |                |
| 12. Not buy things that my friends have just so I can be like them. | 5              | 4                  | 3             | 2            |                |
| 13. Plan ahead when I want to buy something that costs a lot.       | 5              | 4                  | 3             | 2            |                |
| 14. Keep track of how much money I get and spend.                   | 5              | 4                  | 3             | 2            |                |
| 15. Think about what I really need before I buy something.          | 5              | 4                  | 3             | 2            |                |

**Part 2 total** \_\_\_\_\_

## Part 3.




While looking at your actual responses on the survey, record the value for that response in the right-hand column. Add the values to get your total for Part 3. Record your total.

|  | (a) | (b) | (c) | (d) | Response value |
|--|-----|-----|-----|-----|----------------|
| 16. What is the most important thing you should do before you buy a backpack?  | 3   | 5   | 3   | 2   |                |
| 17. You like the style of two backpacks that are both made very well. What should you do to decide which backpack to buy?  | 5   | 3   | 3   | 2   |                |
| 18. You have been earning money from doing small jobs in your neighborhood. You would like to put it somewhere safe. Which of these choices would be the safest place for you to put your money? | 3   | 5   | 3   | 2   |                |
| 19. Which letter shows the steps in the order you should follow to start selling drinks?   | 3   | 3   | 5   | 2   |                |
| 20. You have set up your drink stand. Which letter shows the steps in the order you should follow to buy your bicycle?   | 3   | 3   | 5   | 2   |                |

**Part 3 total** \_\_\_\_\_

## Calculating your results

Enter the totals you got for each section of the survey in the table below. Then, add these three totals to get your result.

| Section  | Record your total |
|--|-------------------|
|  <b>Part 1. Planning and self-control</b>   |                   |
|  <b>Part 2. Money habits and values</b>     |                   |
|  <b>Part 3. Money knowledge and choices</b> |                   |
| <b>YOUR RESULT</b>   |                   |

Next, see where your results fall on the levels below. As you review your results, think about things you're doing well and things you could do better.

Remember that everyone, no matter how old they are, is on their own lifelong money journey. We can all learn to do more to manage our money.

## Where you are on your money journey

### 40-60

You're **starting out!** This means that you're beginning to learn the important money skills and choices you'll need to have the money future you want.



### 61-89

You're **on the road** to the money future you want! This means you have some important money habits and skills, but you can still learn more.



### 90-100

You're **well on your way** to getting to the money future you want! This means you use many types of skills and behaviors that help you manage your money. But remember that we can always continue to improve.

Your money journey includes three important areas:

- Planning and self-control
- Money habits and values
- Money knowledge and choices

Exploring each of these areas will help you get the money future you want.

## Part 1. Planning and self-control

### 16-24

You're **starting out** on your journey to strong planning and self-control skills!



### 25-37

You're **on the road** to having stronger planning and self-control skills!



### 38-40

You're **well on your way** to having strong planning and self-control skills!

To make progress in this area, practice things like planning ahead, remembering information, and solving problems.

## Part 2. Money habits and values

14-21

You're **starting out** on your journey to strong money habits and values!



22-32

You're **on the road** to developing stronger money habits and values!



33-35

You're **well on your way** to having strong money habits and values!

To advance in this area, practice having a positive attitude about saving and spending and make your own rules about money.

## Part 3. Money knowledge and choices

10-15

You're **starting out** on your journey to strong money knowledge and decision-making skills!



16-20

You're **on the road** toward stronger money knowledge and decision-making skills!



21-25

You're **well on your way** toward strong money knowledge and decision-making skills!

To get farther in this area, learn facts about saving and spending money and use what you've learned to make the best money choices for you.

## Stop and think

Which part of your journey is your strongest?

Which one do you want to work on?

## What now?

Use the "Taking the next steps on your money journey" worksheet to think about your strengths and set goals to get the money future you want. Talk with your teacher, your parents, or another trusted adult about your money map. They can also help you set your goals.

Remember: You are on a money journey that will last your whole life. Everyone, no matter how old or young they are, can always get better at managing money!