

## Screenener

*We emailed people who had previously volunteered to be involved in studies, and asked them to fill out the following survey.*

### **Personal Finance Survey**

We're a group of anthropologists, designers, and engineers, and we work at an internet company that regularly conducts research to understand how people use the internet.

In this study, we are looking for people who live in the San Francisco Bay Area for a 90-minute in-home interview about personal money and finance management. If you are interested in seeing if you are a match for this study, please complete this questionnaire.

We respect your privacy and any personal information that you provide in this survey will be used in accordance with our Privacy Policy. We are looking for a variety of different types of participants and none of our questions have right or wrong answers. By being honest and direct in your responses, you will allow us to quickly get back to you.

Thanks for your time!

1. Are there any children in your household? Check all that apply.

I have one or more children aged under 3.

I have one or more children aged under 13.

I have one or more children aged 13-18.

I have one or more children aged 18+.

I have no children.

2. Who earns money in your family? Check all that apply.

I am the primary breadwinner in the family.

My partner is the primary breadwinner in the family.

My partner and I earn roughly comparable amounts.

3. Which of these statements would you say are true about your education?

I have a high school diploma or equivalent.

I have an Associates or Bachelors degree.

I have a Masters or Ph.D degree.

4. Which of these statements would you say are true about your debt? Check all that apply.

I have a mortgage. I owe more than \$10,000 on a car loan.

I owe more than \$20,000 in credit card debt. I owe more than \$20,000 in student loans. I

owe more than \$20,000 in other bank loans. I owe more than \$20,000 in other debt.

5. Which of these statements would you say are true about you? Check all that apply.

I own my house.

I have a 401(k).

I own stocks, bonds, mutual funds or EFTs.

I have a professional financial advisor who handles my investments.

I am retired or likely to retire in the next five years

6. How often do you trade (buy or sell) stocks, bonds, EFTs or mutual funds?

Never Less than 5 trades a year 5-15 trades a year More than 15 trades a year

I don't know

7. What is the approximate value of your total household's liquid investable assets? By this we mean assets that you could readily invest, such as cash in an account, or easily sell, such as stocks and bonds. Please exclude illiquid assets like a 401(k), pensions or property.

\$0-\$50k \$50k-\$100k \$100k-\$250k \$250k-\$500k \$500k-\$1M \$1M+

8. We would like to visit you in your home to understand the tools you use to keep track of your finances. Are you available during the following times? Please check ALL the times you are available.

We would like to visit you in your home to understand the tools you use to keep track of your finances. Are you available during the following times? Please check ALL the times you are available.

Monday, February 11th, 10am-12pm

Monday, February 11th, 1pm-6pm

*[list of dates and times cut for space]*

Sunday, March 3rd, 1pm-6pm

9. What is your gender?

Male Female Other

10. When were you born?

1993-2013 1983-1992 1973-1982 1963-1972 1953-1962 1943-1952 1933-1942 1933-

11. Is there anything else you'd like to tell us?

12. We will need your contact information in order to follow up with you. We may attempt to contact you once by telephone and once by email. Don't worry, this information will not be used for any other purpose outside of this study.

Please keep in mind that answering this questionnaire does not guarantee that you will be invited to participate in our research study, nor does it guarantee compensation.

Thank you for your interest and time!

Name:

Email:

Home zip code:

Phone number:

Current occupation:

Employer/company: