

## Client Survey

Organization \_\_\_\_\_

Client Name \_\_\_\_\_

Homeownership Advisor \_\_\_\_\_

Date \_\_\_\_\_

Below are general statements about your financial activities and knowledge. Think back to the beginning of the Program and consider what you've learned and how your activities have changed since then. For each statement, place an "X" in the column that best describes the change in your knowledge or actions since you started the Program.

		Significantly Increased	Increased	Stayed the Same	Decreased	Significantly Decreased
<b>Banking</b>						
1	My understanding of the banking system					
<b>Budget/Spending</b>						
2	The frequency that I track my spending					
3	My understanding of the importance of a spending plan					
<b>Credit Report</b>						
4	The frequency that the goal of improving my credit plays a role in my financial decisions					
5	My understanding of how my credit affects my ability to get a loan					
<b>Savings</b>						
6	The frequency that the goal of saving money plays a role in my purchase decisions					
7	My understanding of the importance that saving money plays in my ability to purchase of a home					
<b>Attitudes</b>						
8	My ability to handle financial obstacles					
9	The frequency that I make good financial decisions					