

Take the Road to Financial Security in Later Life Follow-Up Program Evaluation

About 6 months ago you participated in the “Take the Road to Financial Security in Later Life” program. We’d like to ask you a few questions about what you learned and how you have used the information.

The purpose of this program was to introduce you to basic concepts involved in later life financial security. Answering these questions is voluntary. Neither your name nor any other information that may identify you personally will be included in any public summary or report of responses to these questions.

A. Circle **Yes** for each action you have taken as a result of this program:

1. Identified later life financial goals?	Yes
2. Determined later life income needs?	Yes
3. Established or revised saving and investment goals?	Yes
4. Estimated my life expectancy?	Yes
5. Discussed my later life needs and goals with others?	Yes
6. Organized my financial records?	Yes
7. Identified health insurance options after retirement?	Yes
8. Initiated or increased my contributions to my employer-provided retirement plans?	Yes
9. Initiated or increased my contributions to any savings plans?	Yes
10. Reviewed my Social Security Statement?	Yes
11. Built more than one source of income for later life?	Yes
12. Reviewed my savings and investment plans?	Yes
13. Identified the risks, costs, and financing options to protect against changes in health, including long term care?	Yes
14. Developed a plan for managing the risk of long term care?	Yes
15. Developed a plan for my later life financial future?	Yes

16. Prepared or updated a will?	Yes
17. Updated my list of beneficiaries?	Yes
18. Prepared or reviewed a plan for protecting and distributing my assets?	Yes
19. Reviewed insurance coverage and property ownership?	Yes
20. Prepared a power of attorney and advance health directive?	Yes
21. Discussed estate plans with aging parents?	Yes
22. Discussed long term care plans with aging parents?	Yes

Please list any other specific action steps you've taken as a result of participating in this program:

B. After attending the program, did you share information about it with other people?

Yes _____, How many? _____ No _____

C. As a result of this program, do you know where to find information to help you make decisions about later life?

Yes _____ No _____

D. Background Information:

What is your age? _____

Please check: Male _____ Female _____

E. Any other comments you would like to share about this program:

Thank you!

Developed by Janet Bechman, Purdue University; Marlene Stum, University of Minnesota; Suzann Enzian Knight, University of New Hampshire. Financial Security in Later Life National Initiative Management Team Members. April, 2002