|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Never**  **(1)** | **Seldom**  **(2)** | **Sometimes**  **(3)** | **Often**  **(4)** | **Very Often**  **(5)** |
| Concerned that my financial situation is affecting my personal relationships |  |  |  |  |  |
| I depend on my spouse to provide for me financially Wish I did not have financial responsibilities |  |  |  |  |  |
| Carefully review the financial information I receive in the mail |  |  |  |  |  |
| Irritated with people who don’t plan ahead and save or invest for their own future |  |  |  |  |  |
| Satisfied with my current financial situation |  |  |  |  |  |
| Clear idea of what my financial needs will be during retirement |  |  |  |  |  |
| Maximize contributions to my retirement accounts Confident that I will have a financially secure future |  |  |  |  |  |
| Important to set up automatic deposits to savings and investment accounts |  |  |  |  |  |
| Important to set clear financial goals with timelines and dollar amounts |  |  |  |  |  |
| Like to plan for my financial future |  |  |  |  |  |
| Feeling financially secure improves the quality of my life |  |  |  |  |  |
| Responsible for my own financial well-being |  |  |  |  |  |
|  |  |  |  |  |  |
| Investing is difficult |  |  |  |  |  |
| Investing is exciting |  |  |  |  |  |
| Investing is time-consuming |  |  |  |  |  |
| Investing is stressful |  |  |  |  |  |
| Investing is satisfying |  |  |  |  |  |
|  |  |  |  |  |  |
| I stick with a consistent investment strategy even if the stock market is volatile |  |  |  |  |  |
| I am satisfied with my current investment mix |  |  |  |  |  |
| I am confident about my ability to invest |  |  |  |  |  |
| I am knowledgeable about investing |  |  |  |  |  |
| I choose to invest regularly even if it means I have to make some sacrifices elsewhere in my life |  |  |  |  |  |
| I regularly review and compare my investment performance with market benchmarks |  |  |  |  |  |
| I worry about the outcome of my investments I started to invest regularly early in my life |  |  |  |  |  |