|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **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  |  |  |  |  |  |