

## Actions Taken and Feedback

Participant ID: \_\_\_\_\_

Congratulations on your completion of "*Building Your Financial House!*" We were glad to have you part of this program and hope you feel you have built up your money knowledge, skills, and confidence to make sound choices for your situation. As we continue to evaluate the program, we would like to know what actions you were motivated to take as a result of *Building Your Financial House*. Sharing this information will help us to improve future presentations and material updates. Thank you!

	<b>As a result of BYFH:</b>	<b>What do you feel are the top three takeaways from the module?</b>	<b>Do you have any additional comments about the module?</b>
<b>Module 1 Invest in Yourself</b>	I now have a plan to achieve my personal success. I identified, developed, and/or shared a skill or talent. I created or updated my resume. I asked my employer about training programs or other job opportunities. I enrolled in: a degree/career program. an enrichment class. an employer-sponsored training program. I started volunteering. I now have written financial goals. I learned more from the additional resources. I shared this session's information with others.	1.  2.  3.	
<b>Module 2 Maximize Earnings</b>	I checked/applied for cash/non-cash assistance. I check my pay statement on a regular basis. I reviewed and/or am using (a) new employee benefit(s). I know the actual dollar value of using my pre-tax benefits. I made a job decision based on pay AND employee benefits. I changed my tax withholding allowances. I learned more from the additional resources. I shared this session's information with others.	1.  2.  3.	

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<b>Module 3 Spend Sensibly and Map Your Money</b>	<p>I made changes to my spending habits.</p> <p>I have fewer regrets about my spending decisions.</p> <p>I have been able to buy what I need.</p> <p>My partner and I now discuss money without arguing.</p> <p>I use a money map and/or money map tool.</p> <p>I changed the way I manage my cash.</p> <p>I opened a new account at a bank/credit union.</p> <p style="padding-left: 40px;">checking account      certificate of deposit</p> <p style="padding-left: 40px;">savings account      money market deposit account</p> <p>I ordered my free ChexSystem report.</p> <p>I learned more from the additional resources.</p> <p>I shared this session's information with others.</p>	<p>1.</p> <p>2.</p> <p>3.</p>	
<b>Module 4 Check Taxes</b>	<p>I established/adjusted my record keeping system.</p> <p>I had my taxes prepared at a VITA site.</p> <p>I saved part of my tax refund for emergencies.</p> <p>I changed my withholding allowances.</p> <p>I learned more from the additional resources.</p> <p>I shared this session's information with others.</p>	<p>1.</p> <p>2.</p> <p>3.</p>	

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<b>Module 5 Make Money Work</b>	<p>I pay myself first.</p> <p>I use a new place to stash my cash.</p> <p>I started building a new asset.</p> <p>I now contribute (or increased amount) to a retirement plan.</p> <p>I have talked to an advisor (at work, bank, credit union, or other financial services) about investing.</p> <p>I monitor my net worth.</p> <p>I learned more from the additional resources.</p> <p>I shared this session's information with others.</p>	<p>1.</p> <p>2.</p> <p>3.</p>	
<b>Module 6 Protect Your Potential</b>	<p>I started/increased my emergencies savings.</p> <p>I updated my insurance policies in place:  Health    Renter's    Automobile  Life       Disability</p> <p>I purchased _____ insurance(s).</p> <p>I have taken steps to protect myself from identity theft.</p> <p>I made/reviewed my advanced medical decisions.</p> <p>I made/reviewed my will.</p> <p>I learned more from the additional resources.</p> <p>I shared this session's information with others.</p>	<p>1.</p> <p>2.</p> <p>3.</p>	

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<b>Module 7 Borrow to Grow</b>	<p>I only borrow to improve my financial picture.</p> <p>I reviewed the terms and cost of my open credit accounts.</p> <p>I made a plan to repay debt or overdue bills.</p> <p>I have paid down/off debt.</p> <p>I pay bills on time.</p> <p>I ordered/reviewed my free credit report(s).</p> <p>I learned more from the additional resources.</p> <p>I shared this session's information with others.</p>	<p>1.</p> <p>2.</p> <p>3.</p>	
<b>IMPACT FOUR SQUARE</b>			
<b>As a result of attending the Building Your Financial House program, please share:</b>			
1. Something you've never done before.		2. A success you have achieved.	
3. A financial challenge you are still working on.		4. The most important thing you learned.	
<b>Please share any additional comments you may have about the program. Thank you</b>			