

WELLBEING ASSESSMENT

Click in box to select
from dropdown menus

- 1 How old are you? yrs old
- 2 Have you moved home recently?
- 3 Have you been through a divorce, separation or relationship breakdown recently?
- 4 Has a spouse, close friend or family member of yours passed away recently?
- 5 Are you currently working?
- 6 Do you have any financial dependants?
- 7 Are you a carer?
- 8 Have you been declared Bankrupt or had a County Court Judgement against you in the last 5 years?
- 9 Have you ever been a victim of financial fraud?
- 10 Has your physical health changed in the last 12 months?
- 11 Do you have any difficulties with your hearing (including using a hearing aid)?
- 12 Do you have any difficulties with your sight?
- 13 Have you ever suffered a brain injury?
- 14 Have you struggled with your mental health or memory?
- 15 Have you been subject to a Safeguarding order in the last 5 years
- 16 Is English your first language?
- 17 Have you ever been diagnosed (or suspect you have) Dyslexia
- 18 Academic Qualifications

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V1.0 (Jan. 2022)

FINANCIAL ATTITUDE ASSESSMENT

Rate how much you agree with the following statements

Strongly Agree Agree Neutral Disagree Strongly Disagree

1	I would like someone to solve my financial problems					
2	Even if my finances go down I will handle it well					
3	I often feel helpless when reviewing my finances					
4	I cope well with changes to my financial situation					
5	It is often hard for me to make up my mind when financial planning					
6	Even at difficult times, I can make good financial decisions					
7	I would like to hand over my financial decision making to others					
8	I Find the amount of information attached to financial products too much to bear					
9	I keep calm in a personal financial crisis					
10	When reviewing my finances, I often think it is "all too much" to understand					
11	I look to a financial adviser for all the answers					
12	I have mostly felt on top of money and investing					
13	I would be happy to give control of my finances over to someone else					

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