

# Intake Form

**Description:** Please provide access to John Brinkerhoff and Jerry Basford.

**Date Created:** 12/6/2010 4:23:14 PM

**Date Range:** 12/10/2010 12:00:00 AM - 6/30/2020 11:59:00 PM

## Page - ASUU Money Management Center Client Information Form

Q1 Name:

[Code = 1] [TextBox]

Required answers: 0 Allowed answers: 1

Q2 UNID:

[Code = 1] [TextBox]

Required answers: 0 Allowed answers: 1

Q3 Please check all that apply:

Student [Code = 1]

Staff [Code = 2]

Faculty [Code = 3]

Required answers: 1 Allowed answers: 3

Next Page: Sequential

## Page - 2

NOT ( Q3='Student' AND Q3='Staff' ) AND NOT ( Q3='Student' AND Q3='Faculty' ) AND NOT ( Q3='Staff' AND Q3='Faculty' ) AND NOT Q3='Student'

At this time, the ASUU Money Management Center only serves current University of Utah Students. If you have questions or concerns, please contact John Brinkerhoff, Coordinator at jbrinkerhoff@sa.utah.edu (801) 585-7379.

Required answers: 0 Allowed answers: 0

Next Page:

## Page - 3

( Q3='Student' AND Q3='Staff' ) OR ( Q3='Student' AND Q3='Faculty' ) OR ( Q3='Staff' AND Q3='Faculty' ) OR Q3='Student'

Q4 Please indicate the reason(s) for your visit to the ASUU Money Management Center: (Check all that apply)

Making ends meet [Code = 1]

Budgeting skills [Code = 2]

Managing debt [Code = 3]

Credit card counseling [Code = 4]

Understanding bills and statements [Code = 5]

Establishing emergency savings [Code = 6]

Immediate financial crisis [Code = 7]

Planning for the future (e.g., major purchases, retirement) [Code = 8]

Protecting myself and my family (e.g., insurance) [Code = 9]

Other (please specify) [Code = 10] [TextBox]

Required answers: 1 Allowed answers: 10

Q5 Please describe your current questions/concerns:

[Code = 1] [TextBox]

Required answers: 0 Allowed answers: 1

Q6 How comfortable do you feel managing your personal finances?

Very comfortable [Code = 5]

Comfortable [Code = 4]

Neutral [Code = 3]

Uncomfortable [Code = 2]

Very uncomfortable [Code = 1]

Required answers: 1 Allowed answers: 1

For each of the following, please indicate your skill level:

Q7 Budgeting

Very high [Code = 5]

High [Code = 4]

Moderate [Code = 3]

Low [Code = 2]

Very low [Code = 1]

Required answers: 1 Allowed answers: 1

Q8 Managing debt

Very high [Code = 5]

High [Code = 4]

Moderate [Code = 3]

Low [Code = 2]

Very low [Code = 1]

Required answers: 1 Allowed answers: 1

Q9 Understanding bills and statements

Very high [Code = 5]

High [Code = 4]

Moderate [Code = 3]

Low [Code = 2]

Very low [Code = 1]

Required answers: 1 Allowed answers: 1

Q10 Establishing emergency savings

Very high [Code = 5]

High [Code = 4]

Moderate [Code = 3]

Low [Code = 2]

Very low [Code = 1]

Required answers: 1 Allowed answers: 1

Q11 Planning for the future (e.g., major purchases, retirement)

Very high [Code = 5]

High [Code = 4]

Moderate [Code = 3]

Low [Code = 2]

Very low [Code = 1]

Required answers: 1 Allowed answers: 1

Q12 Protecting myself and my family (e.g., insurance)

Very high [Code = 5]

High [Code = 4]

Moderate [Code = 3]

Low [Code = 2]

Very low [Code = 1]

Required answers: 1 Allowed answers: 1

Q13 Overall, what is your level of knowledge about managing your personal finances?

Very high [Code = 5]

High [Code = 4]

Moderate [Code = 3]

Low [Code = 2]

Very low [Code = 1]

Required answers: 1 Allowed answers: 1

Q14 How important is the topic of personal finance to your experience as a student at the University of Utah?

Very important [Code = 5]

Important [Code = 4]

Neither important nor unimportant [Code = 3]

Unimportant [Code = 2]

Very unimportant [Code = 1]

Required answers: 1 Allowed answers: 1

Next Page: Sequential

The ASUU Money Management Center is student funded. In order to have a better sense of who the Center serves, would you please share a little more information about yourself?

Required answers: 0 Allowed answers: 0

Q15 Up to this point, what portion of your education have you been personally responsible for paying for including personal income, loans, and savings?

Less than 25% [Code = 1]

25% [Code = 2]

50% [Code = 3]

75% [Code = 4]

100% [Code = 5]

Prefer not to respond [Code = 0]

Required answers: 1 Allowed answers: 1

Q16 Currently, how do you pay for your education? (Check all that apply)

Student loans [Code = 1]

Scholarships [Code = 2]

Work [Code = 3]

Savings/trust funds [Code = 4]

My parents/guardians [Code = 5]

Graduate Assistantship (including TA and RA) or Graduate Fellowship [Code = 6]

Other (please specify) [Code = 7] [TextBox]

Prefer not to respond [Code = 0]

Required answers: 1 Allowed answers: 7

Q17 What is your year in school?

Freshman/1st year [Code = 1]

Sophomore [Code = 2]

Junior [Code = 3]

Senior [Code = 4]

2nd undergraduate degree [Code = 5]

Graduate/professional degree program [Code = 6]

Other (please specify) [Code = 7] [TextBox]

Prefer not to respond [Code = 0]

Required answers: 1 Allowed answers: 1

Q18 What is your gender?

Female [Code = 1]

Male [Code = 2]

Other [Code = 3]

Prefer not to respond [Code = 0]

Required answers: 1 Allowed answers: 1

Q19 How do you describe your race/ethnicity? (Check all that apply)

African/African American/Black [Code = 1]

Asian/Asian American [Code = 2]

Caucasian/White [Code = 3]

Hispanic/Latino(a) [Code = 4]

Native American/American Indian/Alaska Native [Code = 5]

Pacific Islander [Code = 6]

Multiracial [Code = 7]

Other (please specify) [Code = 8] [TextBox]

Prefer not to respond [Code = 0]

Required answers: 1 Allowed answers: 8

Q20 What has been your primary source of financial knowledge?

Television, radio [Code = 1]

Internet [Code = 2]

Parents [Code = 3]

Family members [Code = 4]

Friends [Code = 5]

Other (please specify) [Code = 6] [TextBox]

Required answers: 1 Allowed answers: 1

Next Page: Sequential