

Page - Personal Money Management Center (PMMC) 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

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Display if NOT Q3='Student'

At this time, PMMC gives priority to current University of Utah students. However, our Center has numerous resources. Please contact Ann House, Coordinator at ahouse@sa.utah.edu (801) 585-3886 for additional information.

Required answers: 0

Allowed answers: 0

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

Q4 Please indicate the reason(s) for your visit to the PMMC: (Check all that apply)

Making ends meet[Code = 1]

Budgeting skills[Code = 2]

Managing debt[Code = 3]

Understanding cards (credit, debit, gift, prepaid, etc.)[Code = 4]

Investing basics[Code = 5]

Banking and other financial services[Code = 6]

Immediate financial crisis[Code = 7]

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

Understanding student loans[Code = 9]

Identity theft and fraud[Code = 10]

Protecting myself and my family (e.g., emergency savings, insurance needs)[Code = 11]

Other (please specify)[Code = 12] [Textbox]

Required answers: 1

Allowed answers: 12

Q5 Will you receive extra credit for a class by visiting the PMMC?

Yes[Code = 1]

No[Code = 2]

Unsure[Code = 3]

Required answers: 1

Allowed answers: 1

Q6 Please describe your current questions/concerns:

[Code = 1] [Textbox]

Required answers: 0

Allowed answers: 1

Q7 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

Please answer the following:

Q8 Do you have a spending plan (budget)?

Yes[Code = 1]

No[Code = 2]

Unsure[Code = 3]

Required answers: 1

Allowed answers: 1

Q9 Do you have emergency savings?

Yes[Code = 1]

No[Code = 2]

Unsure[Code = 3]

Required answers: 1

Allowed answers: 1

Q10 Do you know how to check your free credit report?

Yes[Code = 1]

No[Code = 2]

Unsure[Code = 3]

Required answers: 1

Allowed answers: 1

Q11 Have you ever completed personal state and federal income tax forms?

Yes[Code = 1]

No[Code = 2]

Unsure[Code = 3]

Required answers: 1

Allowed answers: 1

Q12 Have you ever calculated what you need for retirement?

Yes[Code = 1]

No[Code = 2]

Unsure[Code = 3]

Required answers: 1

Allowed answers: 1

Q13 Do you know how to calculate loan repayments? (e.g., credit cards, student loans, car loans)

Yes[Code = 1]

No[Code = 2]

Unsure[Code = 3]

Required answers: 1 Allowed answers: 1

Q14 Do you know how to manage banking accounts? (e.g., checking, savings)

Yes[Code = 1]

No[Code = 2]

Unsure[Code = 3]

Required answers: 1 Allowed answers: 1

Q15 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

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

The PMMC 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

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

Student loans (federal and private)[Code = 1]

Scholarships[Code = 2]

Work[Code = 3]

Grants (e.g., Pell Grant)[Code = 4]

Montgomery GI Bill[Code = 5]

Savings/trust funds[Code = 6]

My parents/guardians[Code = 7]

Graduate Assistantship (including TA and RA) or Graduate Fellowship[Code = 8]

Other (please specify)[Code = 9] [Textbox]

Prefer not to respond[Code = 10]

Required answers: 1 Allowed answers: 10

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]

Class in high school[Code = 6]

Class in college[Code = 7]

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

Required answers: 1

Allowed answers: 1

Q21 Did you have a personal financial literacy course or something similar in high school?

Yes[Code = 1]

No[Code = 2]

Required answers: 1

Allowed answers: 1

Q22 How did you hear about the PMMC? (Check all that apply)

ASUU[Code = 1]

Flyer, poster, or other marketing by PMMC[Code = 2]

An in-class presentation by PMMC[Code = 3]

Another student[Code = 4]

Faculty/staff member recommended it to me (please specify name and/or department)[Code = 5] [Textbox]

Faculty/staff member announced it in class/to a group of students (please specify name and/or department)[Code = 6] [Textbox]

Required answers: 1

Allowed answers: 6

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