

Results for: Employee Wellness Financial Engagement Survey Record No: 1

Gender

	Responses	Percentage
Female	35	60.3%
Male	23	39.7%

Age

	Responses	Percentage
39 and under	18	30.5%
40 - 54	23	39.0%
55 and above	18	30.5%

How would you rate your level of knowledge about financial matters?

	Responses	Percentage
Very Limited	0	0.0%
Somewhat Limited	5	8.5%
Average	19	32.2%
Good	29	49.2%
Excellent	6	10.2%

How interested are you in learning more about or taking action regarding your financial wellness?

	Responses	Percentage
No Interest	2	3.4%
Little Interest	5	8.5%
Neutral	6	10.2%
Some Interest	32	54.2%
High Interest	14	23.7%

Check each of the following topics pertaining to financial wellbeing that you are interested in knowing more about.

	Responses	Percentage
Investments (Stocks, Bonds, Mutual Funds)	31	55.4%
401k's/403b's	27	48.2%
Insurance	15	26.8%
Long Term Care Planning	14	25.0%
Preparing for Retirement	29	51.8%
Medicare	9	16.1%
Social Security	14	25.0%
Household Budgeting	20	35.7%
Savings Plan	19	33.9%
Debt Reduction	22	39.3%
Estate Planning (Wills, Trusts, Durable Power of Attorney, Power of Attorney for Healthcare, and Living Will)	23	41.1%
Charitable Gift Annuities and other annuities	7	12.5%
Reverse Mortgage\$	4	7.1%
Planning for Students College Expenses	10	17.9%
Tax Savings	31	55.4%

Would you prefer financial help from a professional within Southern's campus or from a professional outside Southern's campus?

	Responses	Percentage
In-house Professional	21	37.5%
Outside Professional	35	62.5%