Primavera Foundation
Homeownership Program – Orientation Survey

Please help us learn more about our program. Your answers will be kept private and won't affect your ability to receive services.

1. Date: _____________________________                        Name: ___________________________

2. What are you hoping to get out of this program? (Check all that apply)
   - Learn how to manage my money
   - Improve my credit
   - Get help buying a home
   - Other __________________

3. How often do you put money aside as saving?
   - On a regular basis
   - Every once in a while
   - Rarely
   - Never

4. Have you set aside funds that would cover your expenses if you or someone in your family lost a job, got sick, or had another emergency?
   - Yes
   - No

5. How secure do you feel your financial situation is right now?
   - Very secure
   - Secure
   - Somewhat secure
   - Not very secure
   - Not at all secure

6. Which of the following statements best describe how you keep track of your income?
   - I keep a written record of my income as it comes in.
   - I have a general idea of my income, but do not keep a written record as it occurs.
   - I do not keep track of my income.
7. Which of the following statements best describe how you keep track of your spending?
   - I keep a written record of my spending as it occurs.
   - I have a general idea of my spending, but do not keep a written record as it occurs.
   - I do not keep track of my spending.

8. Regardless of whether or not you are always able to follow it, do you have some kind of written budget or spending plan?
   - Yes
   - No

9. In the last three months, which of the following services have you used? (Check all that apply)
   - Traditional bank (i.e. Bank of America, Wells Fargo, Chase, etc.)
   - Credit Union (i.e. Vantage West Credit Union, Pima Federal Credit Union, Hughes Federal Credit Union, etc.)
   - Quick Cash Services (i.e. Quick Cash Pawn, Fast Cash, American Cash Pawn, Checks Cashed, etc.)
   - Easy Access Loans (i.e. Title Max Loans, Quick Loans, Fast Loans, etc.)

10. How much do you feel you know about the following topics?

<table>
<thead>
<tr>
<th></th>
<th>Not at all</th>
<th>Somewhat</th>
<th>Very much</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to improve your credit</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>How to budget and manage your money</td>
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<td></td>
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<td>How to protect your identity against financial fraud</td>
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<tr>
<td>How to choose an appropriate home mortgage loan</td>
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<tr>
<td>What factors determine whether you qualify for a home loan</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

11. How well does this statement describe you or your situation?

<table>
<thead>
<tr>
<th>This statement describes me</th>
<th>Completely</th>
<th>Very well</th>
<th>Somewhat</th>
<th>Very little</th>
<th>Not at all</th>
</tr>
</thead>
<tbody>
<tr>
<td>I could handle a major unexpected expense</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am securing my financial future</td>
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<tr>
<td>Because of my money situation, I feel like I will never have the things I want in life</td>
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<tr>
<td>I can enjoy life because of the way I'm managing my money</td>
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<tr>
<td>I am just getting by financially</td>
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<tr>
<td>I am concerned that the money I have or will save won’t last</td>
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</tbody>
</table>
12. How often does this statement apply to you?

<table>
<thead>
<tr>
<th>This statement applies to me</th>
<th>Always</th>
<th>Often</th>
<th>Sometimes</th>
<th>Rarely</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Giving a gift for a wedding, birthday or other occasion would put a strain on my finances for the month</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>I have money left over at the end of the month</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>I am behind with my finances</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>My finances control my life</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

13. How did you take the survey?
- ☐ I read the questions
- ☐ Someone read the questions to me

Thank you!

For office use only

Client Id: ____________________________
(If more than one adult in the household go through program, the second adult’s id should end with b).

Age: ______________________________

Number of Adults in Family: __________ Number of Children in Family: __________

Credit Score: _________________________ Date of Credit Score: __________________

Household monthly income: __________

Total savings: ________________

Total debt: ________________

Program (Check all that apply):
- ☐ Her Family
- ☐ Mis Abuelitos
- ☐ Financial capability
- ☐ Homeownership
- ☐ Everyone Wins
- ☐ Other: ________________

Counselor: ___________________________ Date Survey Entered in SM: __________