

Financial Vulnerability Survey for Professionals (FVS Pro) - 17 Questions

Approx. time: 20 - 25 min. | www.OlderAdultNestEgg.com | © Peter A. Lichtenberg, PhD, 2022

AGE:

GENDER:

RACE/ETHNICITY

HIGHEST LEVEL OF EDUCATION

Male Female _____

DO YOU LIVE ALONE? Yes No

ARE YOU EMPLOYED? Yes No

ARE YOU: Married Life Partner (unmarried) Widowed Single

DATE: _____ / _____ / _____

SECURE ID CODE _____

Select one response for each question and describe response when requested

1. How worried are you about having enough money to pay for things?

Not at all worried (0) Somewhat worried (1) Very worried (2)

2. Overall, how satisfied are you with your finances?

Satisfied (0) Neither satisfied nor dissatisfied (1) Dissatisfied (2)

3. Who manages your money day-to-day?

I do, without any help (0) I get help from someone (1) Someone else manages all my money (2)

4. How satisfied are you with this money management arrangement?

Satisfied (0) Neither satisfied nor dissatisfied (1) Dissatisfied (2)

5. How confident are you in making big financial decisions?

Confident (0) Unsure (1) Not confident (2)

6. How often do you worry about financial decisions you've recently made?

Never or rarely (0) Sometimes (1) Often (2)

7. Have you noticed any money taken from your bank account without your permission?

No (0) Yes (1)

If **Yes**, who, when, how much?

8. How often do your monthly expenses exceed your regular monthly income?

Never or rarely (0) Sometimes (1) Often (2)

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9. How often do you talk with or visit others on a regular basis?

- Daily or Weekly (0) Monthly (1) Less than monthly (2)
-

10. How often do you wish you had someone to talk to about financial decisions, transactions, or plans?

- Never or rarely (0) Sometimes (1) Often, (2)
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11. How often do you feel anxious about your financial decisions and/or transactions?

- Never or rarely (0) Sometimes (1) Often (2)

If **Often**, describe

12. Do you have a confidante with whom you can discuss anything, including your financial situations and decisions?

- Yes (0) No (1)
-

13. How often do you feel downhearted or blue about your financial situation or decisions?

- Never or rarely (0) Sometimes (1) Often (2)
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14. Are your memory, thinking skills, or ability to reason with regard to financial decisions or financial transactions worse than a year ago?

- No (0) Yes (1)

If **Yes**: Describe

15. Has a relationship with a family member or friend become strained due to finances as you have gotten older?

- No (0) Yes (1)

If **Yes**: Who and to what degree?

16. Did anyone ever tell you that someone else you know wants to take your money?

- No (0) Yes (1)
-

17. How likely is it that anyone now wants to take or use your money without your permission?

- Unlikely (0) Somewhat likely (1) Very likely (2)

If **Very likely**: Who? Describe