

ZIP CODE \_\_\_\_\_ GENDER \_\_\_\_\_ AGE \_\_\_\_\_ RACE/ETHNICITY \_\_\_\_\_

Please identify your top 3 financial needs or concerns 1 being most important. (You will not be solicited. You will only be contacted with the information selected. Earn it. Keep it. Save it. will not share your information and you will not be contacted if you do not check anything).

- |  |  |
|--|--|
| <input type="checkbox"/> I am worried about losing my home.  | <input type="checkbox"/> I am unable to obtain a bank account                        |
| <input type="checkbox"/> I need help making and sticking to a budget.  | <input type="checkbox"/> Financial Aid for Education                                 |
| <input type="checkbox"/> I need financial help with:   | <input type="checkbox"/> I would like to speak to someone about my financial future. |
| <input type="checkbox"/> Going back to school.   | <input type="checkbox"/> I need help understanding Housing (Buying, Mortgages)       |
| <input type="checkbox"/> A down payment on a home.   | <input type="checkbox"/> I need help qualifying for a loan                           |
| <input type="checkbox"/> Starting a small business.  | <input type="checkbox"/> I am currently trying to avoid bankruptcy                   |
| <input type="checkbox"/> I am receiving calls from debt collectors.  | <input type="checkbox"/> Other _____   |
| <input type="checkbox"/> I struggle paying off loans   |  |
| <input type="checkbox"/> I am in need of general financial advice and would like to receive monthly newsletters. |  |

If you would like to be contacted, please let us know how:

Phone: \_\_\_\_\_ Email: \_\_\_\_\_ Name: \_\_\_\_\_

The following questions help us continue to provide free tax preparation. Your answers WILL NOT be connected to your information and you WILL NOT be contacted regarding your response.

1. Are you a student?  Yes  No
2. How many jobs did your household have in 2011?  1  2  3  4  5+
3. Have you been involuntarily unemployed in the last 12 months?  Yes  No
4. How did you have your taxes done last year?  Here  Another free place like this  Did my own  
 Family or friend did them for me  Did not file last year  I paid a business
5. How many people are you supporting financially (include yourself)?  1  2  3  4  5+
6. In 2010 were you?  Married (filing joint)  Single  Married (filing separate)  Head of Household  
 Widow or Widower
7. Where do you cash your paycheck?  Grocery store/market  Check cashing place and/or payday lender  
 Family/friend cash it for you  Bank/credit union  Direct Deposit  Other \_\_\_\_\_
8. Do you plan on buying any of the following in the next 12 months?  Buying a home  Buying a car  
 Education (college or vocational training)  Starting a small business  Buying a computer
9. What are you saving for? \_\_\_\_\_
10. What is your yearly household income?  10,000-14,000  14,001-18,000  18,001-22,000  22,001-26,000  
 26,001-29,000  29,001-33,000  33,001-37,000  37,001+
11. If you received a tax refund last year, how did you spend it? (Check all that apply)  

<input type="checkbox"/> To help buy a home or manufactured home	<input type="checkbox"/> To pay medical bills
<input type="checkbox"/> To help buy a car or other automobile	<input type="checkbox"/> To pay car insurance
<input type="checkbox"/> To help buy a household appliance (washer/dryer/vacuum)	<input type="checkbox"/> For your business/micro business or self employment costs
<input type="checkbox"/> To help buy a laptop/computer	<input type="checkbox"/> For basic needs such as food, utilities, rent, and mortgage
<input type="checkbox"/> To help buy furniture	<input type="checkbox"/> For education
<input type="checkbox"/> To help a family member with the cost of a green card	<input type="checkbox"/> To pay off a payday loan
<input type="checkbox"/> To pay property taxes	<input type="checkbox"/> Saved it
<input type="checkbox"/> Pay down credit card debt	<input type="checkbox"/> Other _____
13. Would you like a reminder for VITA next year?  Yes  No

Thank you for completing our survey.  
Earn it. Keep it. Save it.