

Financial Wellness Engagement Tool – Short Version

The purpose of these questions is to hear from you, about your dreams, your views about your own financial situation, what bothers you most about it, and what you feel can help you improve it. I really want to hear your own perspective on things, so we can later think together about a Financial Wellness Action Plan that will work for you.

Motivations to Engage in Financial Wellness

Personal and recovery motivations

Many people have dreams about what they would like to accomplish in their lives, what they would like to do, and how they would like their lives to be.

1. What life dreams do you have? Why are these important to you?

PROBES:

What things matter most to you in life? What would you like to accomplish most in life?

If money were no object, what kinds of things would you like to be able do that you cannot do today?

Views about current financial situation

2. Tell me about your current financial situation. What bothers you most about it?

PROBES:

What would you like to change most about your current financial situation?

What are things you cannot do because of your financial situation?

When you think about your financial situation, how do you feel about yourself?

Perceptions about Current Financial Situation, Barriers and Assets

Causes

3. What do you feel is causing your current financial situation? Why is your financial situation the way it is today?

- a. What do others in your family, your friends, peers, or others in your community think about your financial situation?

Barriers and Assets

4. What do you feel is holding you back, keeping you from improving your financial situation? Anything about?

- yourself
- your family
- others in your life
- the services or supports you receive
- the community around you
- the way you were raised, your race/ethnicity, gender, immigration status, etc.

PROBE: For example, lack of support, embarrassment or shame, lack of hope, fear, stigma or discrimination, lack of services, or lack of information?

5. What strengths (assets) do you feel you have that can help you improve your financial situation? Things about ...?

- yourself
- your family
- others in your life
- the services or supports you receive
- the community around you
- the way you were raised, your race/ethnicity, gender, immigration status, etc.

PROBE: For example, your values, determination, support you already have, etc.

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Personal Strategies and Past Help

6. Often, people cope with their financial situation in different ways or look for different sources of support. **In the past, how have you coped with difficult financial times? What have you done to improve your financial situation?**
 - a. What types of services or supports have been **most helpful to you**?
 - b. What types of services or supports have **NOT been helpful to you**?

Preferences about How to Be Helped

Preferences Now let's talk some more about the help you need.

7. **What kinds of services or supports would be most USEFUL to you right now in improving your financial situation?**
 - a. What does your family, friends, peers or other people in your life think would be helpful to you in improving your financial situation? What do they think you should do?
8. **How can our program help you to improve your financial situation?**
 - a. How can we be most helpful to you in improving your financial situation?
 - b. What specific services or supports could our program provide to help you improve your financial situation?

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