

# RESOURCES

## Feedback Survey (1 of 2)

We would like your feedback on the video and the list of seven steps. This survey is anonymous and will take only a few minutes.

1. You just viewed a video on why employees open a supplementary retirement account (SRA).

Please answer the following questions on this video: [Note: each item presents a scale of 1 to 5, 1 being "Not at all" and 5 being "Extremely"]

a) The person seemed credible 1 | 2 | 3 | 4 | 5

b) I could relate to the person 1 | 2 | 3 | 4 | 5

c) The information was useful 1 | 2 | 3 | 4 | 5

d) I liked the video 1 | 2 | 3 | 4 | 5

e) The video would motivate me to save more 1 | 2 | 3 | 4 | 5

f) The video would motivate me to open a retirement savings account 1 | 2 | 3 | 4 | 5

2. Think back to the video you just saw. Please circle the number in the space indicated that best reflects your thoughts: [Note: each item presents a scale of 1 to 5, 1 being "Strongly Disagree" and 5 being "Strongly Agree"]

a) I think there are benefits in using financial advisors 1 | 2 | 3 | 4 | 5

b) I would consider using a financial advisor within five years 1 | 2 | 3 | 4 | 5

c) I would follow the recommendations of a financial advisor 1 | 2 | 3 | 4 | 5

d) I would recommend a financial advisor to my relatives/friends 1 | 2 | 3 | 4 | 5

3. You also received a list of seven steps to help you open a retirement savings account.

This information is also in your benefits packet. Please answer the following questions on this list: [Note: each item presents a scale of 1 to 5, 1 being "Not at all" and 5 being "Extremely"]

a) The information on the steps seemed useful 1 | 2 | 3 | 4 | 5

b) The steps seemed easy to do 1 | 2 | 3 | 4 | 5

c) I think I can undertake these steps 1 | 2 | 3 | 4 | 5

d) I liked what I saw in the step-by-step plan 1 | 2 | 3 | 4 | 5

e) The steps made me feel I had to make fewer choices 1 | 2 | 3 | 4 | 5

f) This list might motivate me to save more 1 | 2 | 3 | 4 | 5

g) This list might motivate me to open a retirement savings account 1 | 2 | 3 | 4 | 5

# RESOURCES

## Feedback Survey (2 of 2)

4. How did the information presented in the video and the list of seven steps make you feel:  
[Note: each item presents a scale of 1 to 5, 1 being "Less than before" and 5 being "More than before"]
- a) Anxious about the future    1 | 2 | 3 | 4 | 5
  - b) The importance of thinking about retirement    1 | 2 | 3 | 4 | 5
  - c) Need for personal control over retirement saving    1 | 2 | 3 | 4 | 5
  - d) The future seem more manageable    1 | 2 | 3 | 4 | 5
  - e) Increased awareness and understanding of future financial needs    1 | 2 | 3 | 4 | 5
  - f) The decision-making process is simpler    1 | 2 | 3 | 4 | 5
  - g) The importance of job stability    1 | 2 | 3 | 4 | 5
5. Were you previously contributing to a Supplementary Retirement Account (SRA), 401(k) or 403(b) plan? [Circle one]    **Yes** | **No** | **I do not know**
6. What is your age? \_\_\_\_\_
7. What gender are you?    **Male** | **Female**
8. Please indicate your annual salary: [Circle one]  
**35,000** | **36,000 – 50,000** | **51,000 - 75,000** | **76,000 – 90,000** | **> 90,000**