

Survey: All States Save to Win 2017 Survey

We are excited that you are taking this important step in building a savings foundation. In order to get a better understanding of your needs, we invite you to participate in a Save to Win Survey that is being facilitated by your Credit Union, your Credit Union State League, and national non-profit Commonwealth (based in Boston, MA).

This survey will take approximately 5 minutes to complete, and it is very important for us to learn from your input.

Your participation in this study is completely voluntary. If you feel uncomfortable answering any questions, you can withdraw from the survey at any point. Your survey responses will only be used to help us understand the Save to Win product and its impact on helping Americans save. Data from this research will be reported only in the aggregate so your individual responses will remain strictly confidential.

Thank you in advance for your time and feedback!

*** What State is your Credit Union based in?**

- Michigan
 - Nebraska
 - Connecticut
 - North Carolina
 - South Carolina
 - Missouri
 - Illinois
 - Indiana
 - Oregon
 - Washington
 - Kansas
 - Wisconsin
-

What is the name of your Credit Union? (Michigan)

- Alpena Alcona Area CU
 - CASE CU
 - Christian Financial CU
 - Community Alliance CU
 - Community Choice CU
 - Community First FCU
 - Credit Union Advantage CU
 - Diversified Members CU
 - ELGA CU
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- Family Financial CU
 - Family First CU
 - Filer CU
 - FinancialEdge Community CU
 - First General CU
 - Frankenmuth CU
 - Freestar Financial CU
 - HarborLight CU
 - Lake Trust CU
 - Metro North CU
 - Michigan Coastal CU
 - Michigan Community CU
 - Muskegon Co-op FCU
 - One Detroit CU
 - Peninsula FCU
 - People Driven CU
 - Public Service CU
 - Saginaw Medical FCU
 - Shore to Shore Community CU
 - Sunrise Family CU
 - Team One CU
 - The Local CU
 - TruNorth FCU
 - United Financial CU
 - Zeal CU
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What is the name of your Credit Union? (Wisconsin)

- Verve, a CU
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What is the name of your Credit Union? (Nebraska)

- Centris FCU
 - Chadron FCU
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- Family Focus FCU
 - Gallup FCU
 - Mutual 1st FCU
 - Omaha Police FCU
 - Trius FCU
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What is the name of your Credit Union? (Connecticut)

- Achieve Financial FCU
 - Cencap FCU
 - Community CU of New Milford
 - Connex CU
 - Dutch Point CU
 - Healthcare Financial FCU
 - Manchester Municipal FCU
 - Members CU
 - Metropolitan District Employees
 - Northeast Family FCU
 - Seasons FCU
 - Wellness FCU
 - Western Connecticut FCU
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What is the name of your Credit Union? (North Carolina)

- Carolina FCU
 - Lion's Share FCU
 - Greensboro Municipal FCU
 - Piedmont Advantage CU
 - Telco Community CU
 - Vision Financial
 - Winston-Salem FCU
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What is the name of your Credit Union? (Indiana)

- Community Spirit CU
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- Crane CU
 - Diamond Valley FCU
 - Dubois-Pike FCU
 - Evansville FCU
 - Evansville Teachers FCU
 - Financial Builders FCU
 - Financial Center First CU
 - Financial Health FCU
 - Harvester Financial CU
 - Heritage FCU
 - Hoosier Hills CU
 - KEMBA Indianapolis CU
 - Kokomo Heritage FCU
 - Members Advantage CU
 - Members Choice FCU
 - Members Source CU
 - Natco CU
 - One Vision FCU
 - Regional FCU
 - Thrive CU
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What is the name of your Credit Union? (Oregon)

- Mid Oregon FCU
 - Old West FCU
 - Northwest Community CU
 - Pacific Northwest Ironworkers FCU
 - Point West CU
 - St. Helens Community FCU
 - Sunset Science Park FCU
 - United Advantage CU
 - USAgencies CU
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What is the name of your Credit Union? (Illinois)

- Blackhawk Area CU
 - Catholic and Community CU
 - Community Plus FCU
 - Earthmover CU
 - First Financial CU
 - Illinois Educators CU
 - Members "First" Community CU
 - Mid-Illini CU
 - Rock Valley CU
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What is the name of your Credit Union? (Washington)

- Connection CU
 - Express CU
 - evergreenDIRECT CU
 - Fibre FCU
 - Pacific Northwest Ironworkers FCU
 - Peninsula Community FCU
 - TwinStar CU
 - Progressions CU
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What is the name of your Credit Union? (South Carolina)

- Palmetto Citizens FCU
 - SC Telco FCU
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What is the name of your Credit Union? (Missouri)

- Catholic Family CU
 - Century CU
 - First Missouri CU
 - Gateway Metro FCU
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What is the name of your Credit Union? (Kansas)

- Credit Union of America
 - Emporia State FCU
 - Heartland CU
 - Skyward CU
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What branch of your credit union do you most frequently visit?

Section 1

The following questions are about your household, which includes everyone you live with and with whom you share income and expenses. That may include you, your spouse, and other working adults. You should answer the following questions based on the financial situation of your entire household.

Does your household save regularly? (select one)

- Yes, a fixed amount every month
 - Yes, whatever is left over at the end of the month
 - No, my household doesn't save regularly
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Which of the following statements best describes where your household's savings come from? (select one)

- Save a portion of total household income
- Save income of one family member, spend the other
- Save only from "extra" income (e.g. odd jobs, tips, bonuses)
- I/we don't save
- Other (please specify)

Does your household have enough savings to cover three months' worth of expenses if your household faced unexpected shocks such as sickness, car or household repair, or job loss? (select one)

- Yes
 - No, I have some set aside but not enough for three months of expenses
 - No, I used to have some but not anymore
 - No, I have never had money set aside to cover unexpected emergencies
-

Not including your mortgage, if you were to add up all of the money in your savings accounts and your other financial assets today, approximately how much would it amount to?

- \$0
 - \$1 to \$2,000
 - \$2,001 to \$5,000
 - \$5,001 to \$10,000
 - \$10,001 to \$20,000
 - \$20,001 to \$40,000
 - Above \$40,000
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Not including your mortgage, if you were to add up all of your financial debt (such as student loans, credit cards, auto loans, medical debt, etc.) today approximately how much would it amount to?

- \$0
 - \$1 to \$2,000
 - \$2,001 to \$5,000
 - \$5,001 to \$10,000
 - \$10,001 to \$20,000
 - \$20,001 to \$40,000
 - Above \$40,000
-

What is your household's combined annual income?

- \$0 - \$9,999
 - \$10,000 - \$19,999
 - \$20,000 - \$29,999
 - \$30,000 - \$39,999
 - \$40,000 - \$49,999
 - \$50,000 - \$59,999
 - \$60,000 - \$69,999
 - \$70,000 or more
-

My household's monthly income:

- Does not change from month to month
 - Changes a little from month to month
 - Changes a lot from month to month
-

- Other

Section 2

The following questions are about you as an individual, so you should answer based on your individual situation and preferences.

Did you join the Credit Union for the Save to Win account?

- Yes, I joined for the Save to Win account
- No, I was already a member
- No, I joined for another product but ended up opening a Save to Win Account
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Do you have a regular savings account (apart from your Save to Win account) at this or another bank or credit union? If you have more than one savings account, select the option that matches the combined amount you have saved in all savings accounts. (select one)

- Yes - with \$100 or more in it
- Yes - with less than \$100 in it
- No - but I used to have one
- No - I have never had a savings account at another bank or credit union
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Do you have a share certificate or a certificate of deposit (CD) at this or another bank or credit union? If you have more than one CD, select the option that matches the combined amount you have saved in all CDs. (select one)

- Yes - with \$500 or more in it
- Yes - with less than \$500 in it
- No - but I used to have one
- No - I have never had a certificate of deposit at another bank or credit union
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How did you hear about Save to Win? (select all that apply)

- My credit union
- My family or friends
- News publication
- TV or radio
- Social media (e.g. Facebook, Twitter)
- Other
-

Blog post

Save to Win makes me _____ about my credit union (select one).

- More excited
 - Less excited
 - Neither more nor less excited
-

Building savings would make me _____ to use other financial products at this credit union (select one).

- More likely
 - Less likely
 - Neither more nor less likely
 - I'm not sure
-

My age is:

- 18 - 24
 - 25 - 29
 - 30 - 34
 - 35 - 44
 - 45 - 54
 - 55 plus
-

My gender is:

- Female
- Male
- Prefer not to answer
- Self-identify (please specify)

My current family status is:

- Single with no dependent children
-

- Single with dependent children
 - Married or partnered with no dependent children
 - Married or partnered with dependent children
-

My racial/ethnic background is (check all that apply):

- African-American/Black
- Asian
- Hispanic/Latino
- White (non-Hispanic)
- Native American
- Other
