



United Way of King County
Housing Ready. Crisis Resilient AmeriCorps

Name: _____

Date: _____

Investing and Retirement Survey

Check if you or your family receives ANY of the following:

- Temporary Assistance for Needy Families (TANF)
- Basic Food (SNAP or Food Stamps)

- Apple Health
- Section 8 Housing Assistance

Check if you are over the age of 18

Are you aware of additional benefits that you may be eligible for? (circle one)

I don't know 1 2 3 4 5

1. What fraction of Americans have no retirement savings?
 - a. 1/3
 - b. 1/5
 - c. 1/6
 - d. 1/4
2. True or False? You can protect yourself from investment risk by diversifying your investment portfolio?
 - a. True
 - b. False
 - c. Don't Know
3. True or False? Some types of investments will charge you a penalty if you withdraw money before you reach a certain age.
 - a. True
 - b. False
 - c. Don't Know
4. What percentage of your preretirement income do advisors suggest you have the ability to replace with savings and other retirement sources (Social Security, Pension, etc.) after retirement?
 - a. 75%-80%
 - b. 70%-75%
 - c. 50%-60%
 - d. 60%-70%



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