Age-Friendly Banking Survey

The purpose of this survey is to assess how age-friendly your primary, full-service bank or credit union is in terms of products and services, money management training and information, fraud prevention and reporting, ease of accessibility and other associated issues.

This survey is to be completed by an older adult. For the purposes of this survey, an older adult is a resident of the U.S. who is age 55 or over. This survey should take approximately 10 minutes to complete. The survey is confidential and all responses will be anonymously reported. Your participation in this survey is voluntary. We appreciate you taking the time to provide your responses.

Banking Experience
1. What banking services and products have you used within the past 12 months? Please check all that apply.
   [ ] I have not used banking services or products within the past 12 months.
   [ ] Home loans
   [ ] Automobile loans
   [ ] Annuities or IRAs
   [ ] Direct Express® Debit MasterCard®
   [ ] Pre-paid cards
   [ ] Debit cards
   [ ] Credit cards
   [ ] Checking account
   [ ] Savings account
   [ ] Electronic banking

2. How much do you pay in monthly fees for your CHECKING account, if applicable?

3. How much is your minimum balance/deposit for your CHECKING account, if applicable?

4. How much do you pay in monthly fees for your SAVINGS account, if applicable?
5. How much is your minimum balance/deposit for your SAVINGS account, if applicable?

6. How much do you pay in monthly fees for using your debit card, if applicable?

**Financial Information and Education**
7. Does your primary, bank or credit union offer the following:
   - [ ] Financial education information or trainings (e.g. planning for retirement, how to prepare a household budget, preserving savings).
   - [ ] Yearly benefit screens (e.g. assessment of your eligibility for Federal benefit programs, such as Medicare or Supplemental Nutrition Assistance Program).
   - [ ] Information on detecting and preventing financial fraud and abuse and identity theft.

8. Of the following, please check all that you would be interested in receiving from your primary bank or credit union that you do not currently receive:
   - [ ] Financial education information or trainings (e.g. planning for retirement, how to prepare a household budget, preserving savings).
   - [ ] Yearly benefit screens (e.g. assessment of your eligibility for Federal benefit programs, such as Medicare or Supplemental Nutrition Assistance Program).
   - [ ] Information on detecting and preventing financial fraud and abuse and identity theft.

**Fraud Prevention and Reporting**
9. Within the past 12 months, have you noticed a discrepancy in your credit report, such as an unknown address, name, loan or credit cards purchase that is not yours?
   - [ ] I did not request a credit card report within the past 12 months.
   - [ ] Yes, please explain:
   - [ ] No.
   - [ ] I don’t know.

10. Within the past 12 months have you received some kind of communication (e.g. phone call, mail, email or home visit) from someone you do not know, asking for personal financial information (e.g. Your credit card number, bank account number, Social Security numbers, or other personal information)?
    - [ ] Yes, please explain:
    - [ ] No.
11. Within the past 12 months, do you feel that someone has taken your money from you improperly?
[ ] Yes, please explain who and how your money was taken:
[ ] No.
[ ] I don’t know.

12. If you responded with a “Yes” to question 11, was your full-service bank or credit union able to help correct the financial fraud?
[ ] Yes, please explain:
[ ] No.
[ ] I don’t know.
[ ] Not applicable.

Accessibility
13. Does your bank include the following physical, age-friendly features (Check all that apply):
[ ] Comfortable seating.
[ ] Customer restrooms.
[ ] Automatic doorway entry (e.g. for those in wheelchairs or walkers to easily enter the building).
[ ] ATMs with large buttons and easy to understand instructions.
[ ] Large parking lot spaces.
[ ] Access via public transit.
[ ] Ample parking for people with disabilities (e.g. Handicapped parking spots).
[ ] Paved walkway to bank.
[ ] No-step access point on walkway to bank (e.g. for those in wheelchairs or walkers to easily get on the pathway toward the bank’s entrance).
[ ] Ample lighting in the bank.
[ ] Flexible hours.

About You
14. If faced with a significant financial emergency (e.g. death of a spouse or loss of income), I feel confident I have adequately planned and saved well enough to weather the emergency for at least 3 months.
[ ] True
[ ] False

15. Is your local financial institution a bank or a credit union?
[ ] Bank
[ ] Credit union
15. What is your gender?
[ ] Female
[ ] Male

16. What is your age?
[ ] 55 to 60
[ ] 61 to 65
[ ] 66 to 70
[ ] 71 to 80
[ ] 81 to 85
[ ] Over 85

17. What is your zip code?

This completes the survey. Thank you for participating.

About Your Organization [Insert Information About Your Organization Here]

About National Neighbors Silver
National Neighbors Silver is a multi-year campaign to empower, organize and support economically vulnerable older adults. Combining advocacy, organizing and direct service the campaign promotes access to quality banking services and adequate housing for older adults. Working with the banking industry, the aging network and housing experts, National Neighbors Silver offers a platform for policy and program solutions to build economic security and preserve wealth for aging America.

If you have any questions about this survey or about Age-Friendly Banking, please contact [Enter Name, Contact information].