



Member Number: _____

Part II. **MEMBER SURVEY**

We appreciate you taking the time to answer the *optional* questions listed below. Please note that this information is used **exclusively** by NTFCU to better serve **you and our community**.

1. What is your connection to the community?

- Live Volunteer Work Study Financial Education Program Other _____

2. Were you born in the US? Yes No

3. Ethnicity and/or country of origin:

- Dominican Republic Ecuador Puerto Rico Colombia Mexico
 African-American Caucasian Asian Native-American
 Other Latin American Country _____ Other _____

4. What is your approximate Annual Income?

- \$10,000 and below \$10,001-\$20,000 \$20,001-\$35,000
 \$35,001-\$50,000 \$50,001-\$65,000 \$65,001 and above

5. Are you currently employed? Yes No

6. Prior to coming to Neighborhood Trust, did you have a bank account?

- I have one now at another financial institution I never had a bank Account
 I had one in the past I had one in my home country

7. Which of the following services do you currently use on a regular basis?

- Cash checks at check cashing stores Buy money orders
 Pay bills at check cashing stores Send remittances at a money transmitter

8. Where do you save?

- Savings Account Home Sociedad/SAN Other _____

9. Who do you borrow money from? (Check all that apply)

- Bank Friend/family Credit Union Loan Shark
 Never borrowed Credit card / Line of Credit Sociedad/SAN Other _____

10. For what have you borrowed? (Check all that apply)

- Business Emergency Vacation Education Buy House/Property
 Purchase Household Asset Buy Car Pay off Debt Other _____

11. Have you ever seen your credit report/credit history? Yes No








12. How did you hear about NT? (Check all that apply)

- Check Cashing Program Walked by the branch Employer
 Child in school banking Friend or family member Ads/flyers
 Financial Education Program Other _____

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Part III. FINANCIAL WISHLIST

At Neighborhood Trust FCU, we enable our members to become financially empowered through our free personal finance courses and counseling as well as a range of accessible products and services. Please fill out this Financial Wish List in order to help us guide you towards your financial goals.

	I save or would like to save to buy a home .	<input type="checkbox"/> Yes <input type="checkbox"/> No
	I save or would like to save to start / expand a small business .	<input type="checkbox"/> Yes <input type="checkbox"/> No
	I save or would like to save for retirement .	<input type="checkbox"/> Yes <input type="checkbox"/> No
	I save or would like to save for my or my children's education .	<input type="checkbox"/> Yes <input type="checkbox"/> No
	I save or would like to save for emergencies .	<input type="checkbox"/> Yes <input type="checkbox"/> No
	I save or would like to save for a vacation or to visit my country .	<input type="checkbox"/> Yes <input type="checkbox"/> No
	I would like to consolidate my debt .	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>13. What obstacles (if any) have kept you from reaching your financial goals?</p> <p><input type="checkbox"/> Not enough income <input type="checkbox"/> Debt <input type="checkbox"/> Immigration status</p> <p><input type="checkbox"/> No credit history <input type="checkbox"/> Lack of knowledge of financial services <input type="checkbox"/> Lack of access to financial services</p> <p><input type="checkbox"/> Other _____</p>		

Additional Information

I would like to establish credit.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I would like to learn more about my credit history and how to improve my credit score.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I would like to learn more about how to manage my money.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I would like to attend a Personal Finance Course.	<input type="checkbox"/> Yes <input type="checkbox"/> No