



Individual Development Account Exit Interview



Full Name: _____

Mailing Address:(if buying a home, list your new address) _____

Address Continued _____

City: _____ State: _____ Zip Code: _____

Phone: _____ E-mail: _____

Which asset class did you save for?

- First time home purchase
- Small business start up or expansion
- Post secondary education
- Home repair
- Equipment, technology or specialized training to gain/maintain employment
- Purchasing a vehicle for personal use
- Funds associated with securing a rental
- Establishing a retirement account

Did you also use any of the following program modifications?

- Credit builder loan paired with my IDA
- Student loan debt or medical debt paid
- Replacement of a manufactured home

Are you a homeowner?

- Owns a home
- Does not own a home
- Declined to ID

Are you a vehicle owner?

- Owns an automobile
- Does not own an automobile
- Declined to ID

Are you a business owner?

- Owns a business
- Does not own a business
- Declined to ID

TANF:

- Current TANF recipient
- Not a current TANF recipient
- Declined to ID

Education Completed:

- Grades K-5
- Grades 6-8
- Grades 9-11
- HS Diploma/GED
- Some College
- Vocational School Diploma/Degree
- AA degree/graduated two-year college
- BA/BS Degree/Graduated four-year college
- Some graduate school
- Graduate degree
- Declined to ID

Business savers only

Name of business: _____

Web address of business: _____

Business industry:

Administrative & support services (includes office services, janitorial, house cleaning, waste management)

Food services

Health care & social assistance

Manufacturing

Personal services (includes beauty salons, barber shops, dry cleaners, automotive)

Professional, scientific and technical services

Retail trade

Transportation and warehousing

Wholesale trade

Other* - Please specify: _____

* Includes agriculture, construction, education, real estate, information, finance/insurance, arts/entertainment

Used IDA asset to leverage Business Loan or Line of Credit?

Yes If yes, please write in dollar amount: _____

No

Self-employed?

Full Time (35 or more hours per week)

Part time/seasonally

Other - Please specify: _____

Declined to answer

Business gross sales, last calendar year?

Enter dollar figure (an estimate is fine): _____

Not sure

Business profits?

Enter dollar figure (an estimate is fine): _____

Not sure

Education savers only

First generation college student?

Yes No Unknown/Decline to Answer

Name of the Educational Institution: _____

Not applicable - The student is not enrolled in a post-secondary institution

Student loans amount accrued to date (approximate): _____

Home purchase savers only

Purchase price of home: _____

Home loan value: _____

Adjustable or Fixed Mortgage?

Adjustable Fixed Other

Interest rate: _____

Length of mortgage (years): _____

Annual property taxes: _____

Non-Completers only:

Noncompletion reason:

- Income changed
- Unexpected expense
- Unable to qualify for a loan
- Priced out of the market
- Purchased asset without OR IDA
- Other - Please specify: _____

Financial Capabilities Questionnaire - To Be Filled Out By All Savers

Do you currently have a personal budget, spending plan, or financial plan? Yes No

How confident are in your ability to achieve a financial goal you set for yourself today? Not at all confident Somewhat confident Very confident

If you had an unexpected expense or someone in your family lost a job, got sick, or had another emergency, how confident are you that your family could come up with money to make ends meet within a month? Not at all confident Somewhat confident Very confident

Not including your IDA, do you currently have an automatic deposit or electronic transfer set up to put money away for a future use (such as savings)? Yes No

In the last month did your family spend less money than you made? Yes No

In the last 2 months, have you been charged a late fee on a loan or bill? Yes No

How would you rate your current credit record? Very Bad Bad About average Good Very Good

Do you currently have at least one financial goal? Yes No

Additional questions - To Be Filled Out By All Savers

Are you interested in sharing your success story?

Yes No Not applicable

If yes, please choose all that you are willing to share:

Photo Interview (in person, by phone, or e-mail) Video

Optional Satisfaction Survey

How supported did you feel by the staff person helping you with your IDA?

- Extremely supported Not very supported
 Very supported Not at all supported
 Somewhat supported

To what degree did the staff person you worked with provide clear information about the program?

- Information was extremely clear Information was not very clear
 Information was very clear Information was not clear
 Information was somewhat clear

How often did you have positive interactions at the financial institution where you opened your IDA?

- All my interactions were positive A few of my interactions were positive
 Nearly all of my interactions were positive None of my interactions were positive
 Some of my interactions were positive

If you completed the financial education, how informative would you describe the class(es) that you participated in?

- Extremely informative Not very helpful
 Very informative Not at all helpful
 Somewhat informative I never took the financial education

If you completed the asset specific training, how helpful would you describe the training you received?

- Extremely helpful Not very helpful
 Very helpful Not at all helpful
 Somewhat helpful I never received any asset specific training

Overall, how would you rate the experience you had, from start to finish, participating in the IDA program?

- It was a positive experience and I would strongly recommend it
 It was a positive experience and I would have to think about recommending it
 It was a challenging experience, but I would still recommend it
 It was a challenging experience and I would have to think about recommending it
 It was a challenging experience and I would not recommend it

Thank you for your participation in the VIDA/MCSP programs!