

Smarter money thinking

81% of people are just getting by financially.

To help us work out whether our Clever Me programme is right for you, please answer the questions below.



Are you growing your savings and retirement funds? Yes No

If you have a credit card, do you always pay off the full amount each month? Yes No N/A

How often do you worry about not being able to pay your monthly expenses? All the time Sometimes Never

How often do you find yourself just getting by, and living pay to pay? All the time Sometimes Never

Do you think your financial situation affects your performance at work? All the time Sometimes Never

How do you feel about your current financial situation? Very worried Worried Under control

Would you like to talk to one of our Money Coaches? Yes No

Optional: (Please be assured this information will be treated as strictly confidential)

Name: Contact No:

Best time to ring you: Email address:



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