

Generational Wealth Committee Participant Survey

Thank you for participating in the Generational Wealth Committee. Your feedback will help us better understand community priorities, identify resource gaps, and improve future meetings. This survey should take about **5 minutes** to complete.

Section 1: About You

1. Which best describes your current stage? *(Check one)*

- ☐ High school student
- ☐ College student
- ☐ Working professional
- ☐ Business owner
- ☐ Parent/Caregiver
- ☐ Retired
- ☐ Other: _____

2. Have you attended a Generational Wealth Committee meeting before?

- ☐ Yes
 - ☐ No
-

Section 2: Generational Wealth Priorities

3. Which topics are most important to you? *(Select up to 5)*

- ☐ Homeownership
- ☐ Buying land or real estate
- ☐ Budgeting and financial planning
- ☐ Saving and investing
- ☐ Credit repair
- ☐ Starting a business
- ☐ Entrepreneurship
- ☐ Career development
- ☐ Higher education and scholarships
- ☐ Estate planning and wills

- ☐ Trusts and asset protection
 - ☐ Retirement planning
 - ☐ Tax education
 - ☐ Financial literacy for youth
 - ☐ Access to capital or grants
 - ☐ Community investment
 - ☐ Other: _____
-

4. What are the biggest barriers preventing you or your family from building wealth? (Check all that apply)

- ☐ Lack of financial education
 - ☐ Low income
 - ☐ Housing costs
 - ☐ Limited savings
 - ☐ Poor credit
 - ☐ Student debt
 - ☐ Medical debt
 - ☐ Lack of access to loans
 - ☐ Lack of mentors
 - ☐ Limited business opportunities
 - ☐ Transportation
 - ☐ Childcare
 - ☐ Lack of time
 - ☐ Other: _____
-

Section 3: Resource Needs

5. Which resources would be most helpful to you? (Select all that apply)

- ☐ Financial coaching
- ☐ Credit counseling
- ☐ First-time homebuyer education
- ☐ Business development support
- ☐ Legal services
- ☐ Estate planning assistance
- ☐ Tax preparation

- ☐ Investment education
 - ☐ Scholarship information
 - ☐ Workforce development
 - ☐ Mentorship
 - ☐ Networking opportunities
 - ☐ Access to grants
 - ☐ Access to affordable loans
 - ☐ Other: _____
-

6. What would you most like to accomplish in the next 12 months? (Check up to 3)

- ☐ Improve my credit score
 - ☐ Save an emergency fund
 - ☐ Purchase a home
 - ☐ Start a business
 - ☐ Grow my business
 - ☐ Return to school
 - ☐ Increase my income
 - ☐ Create a will or trust
 - ☐ Begin investing
 - ☐ Eliminate debt
 - ☐ Build generational wealth for my family
 - ☐ Other: _____
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Section 4: Meeting Effectiveness

7. Please rate today's meeting.

Statement	Excellent	Good	Fair	Poor
The meeting was well organized	☐	☐	☐	☐
I learned something valuable	☐	☐	☐	☐
The discussion was relevant	☐	☐	☐	☐
I felt comfortable participating	☐	☐	☐	☐
The meeting gave me practical next steps	☐	☐	☐	☐

8. After today's meeting, how confident do you feel about taking steps toward building generational wealth?

- ☐ Much more confident
 - ☐ More confident
 - ☐ About the same
 - ☐ Less confident
-

9. Would you attend future committee meetings?

- ☐ Definitely
 - ☐ Probably
 - ☐ Maybe
 - ☐ Probably not
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Section 5: Looking Ahead

10. What topics would you like future meetings to focus on?

11. What organizations, speakers, or community resources would you like us to bring to future meetings?

12. Is there anything else you would like the committee to know?

Optional Contact Information

Name: _____

Email: _____

Phone: _____

☐ I would like to receive updates about future meetings, trainings, and resources.

Success Metrics (For Committee Use)

Track the following outcomes from survey responses:

- Top five community wealth-building priorities
- Top five resource gaps
- Percentage of participants reporting increased confidence
- Meeting satisfaction score (average across ratings)
- Percentage interested in future participation
- Most requested future topics
- Most requested community partners and resources

This survey provides both quantitative data for reporting and qualitative feedback to guide the committee's future priorities and community engagement efforts.