

The Young Investor

Measure Up Survey

EXHIBIT A -

See how you measure up to other kids in understanding money and investing. Each Quarter, one participant will win his or her choice of a digital video camera, CD ROM drive or flatbed scanner.



Take the Survey Now

View Current Survey Results

See the Winner's List

The Young Investor Survey

Thank you for taking part in our important study. This survey is being conducted to help us learn more about the experiences of students nationwide.

As you will notice as you fill out this questionnaire, many of the questions are about serious topics and issues. It is very important that you answer all questions truthfully and completely, saying exactly what you have experienced. This is not a test; there are no right or wrong answers. Again, please be as honest as you can in answering the following questions.

All of your answers will be totally anonymous.

A. Allowance

A1. How much of an allowance do you currently receive each week?

\$

- I don't receive an allowance
- I'm not sure

A2. Do you usually save some of your allowance?

- Yes
- No
- I don't receive an allowance
- Not sure

B. Gifts

B1. Have you received any of the following as a gift?

Check all that apply

	Yes	No	Not Sure
1. Savings Bonds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Stocks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Mutual Funds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Cash	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Checks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Certificates of Deposit (CDs)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Gold Coins	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

B2. Who has given you these types of gifts?

Check all that apply

<input type="checkbox"/> Parents	<input type="checkbox"/> Grandparents
<input type="checkbox"/> Aunts/Uncles	<input type="checkbox"/> Brothers/Sisters
<input type="checkbox"/> Family Friends	<input type="checkbox"/> Other
<input type="checkbox"/> None of the Above	<input type="checkbox"/> Not Sure

B3. What do you usually do with gifts of money?

Check all that apply

<input type="checkbox"/> Spend it on something I need	<input type="checkbox"/> Spend it on something I want, but don't really need
<input type="checkbox"/> Give it to my Parents to save for me	<input type="checkbox"/> Put it in my savings account
<input type="checkbox"/> Put it into a mutual fund account	<input type="checkbox"/> Buy an individual Stock or Bond
<input type="checkbox"/> I never receive gifts of money	<input type="checkbox"/> Not Sure

C. Work

C1. Do you currently have a part-time job during the school year?

- Yes
- No
- Not Sure

C2. To earn extra money, do you do odd jobs such as shoveling snow, mowing lawns, raking leaves or

babysitting?

- Yes
- No
- Not Sure

D. How taught about Money

D1. How knowledgeable do you think you are about money compared to other people your age?

- Very knowledgeable
- Somewhat knowledgeable
- Not very knowledgeable
- Not knowledgeable at all
- Not Sure

D2. Who has taught you what you know about money and investing?

Check all that apply

<input type="checkbox"/> My parents	<input type="checkbox"/> My teachers
<input type="checkbox"/> My brothers or sisters	<input type="checkbox"/> My friends
<input type="checkbox"/> Television	<input type="checkbox"/> Books and/or Magazines
<input type="checkbox"/> I figured it out myself	<input type="checkbox"/> Not Sure

D3. Have you ever taken a class where you learn about money and investing?

- Yes, taken such a class
- No, not taken such a class
- Not Sure

D4. Would you like to take a class where you learn more about money and investing?

- Yes, would like to take such a class
- No, would not like to take such a class
- Not Sure

E. College

E1. Are you planning to attend college?

- Yes, planning to attend college

- No, not planning to attend college
- Not Sure

E2. Are you currently saving money for college?

- Yes, currently saving
- No, not currently saving
- Not Sure

E3. Are your parents currently saving money for your college education?

- Yes, currently saving
- No, not currently saving
- Not Sure

F. Family Finances

F1. Do your parents discuss family finances with you on a regular basis?

- Yes, discuss
- No, don't discuss
- Not Sure

F2. Do you own any mutual funds?

- Yes
- No
- Not Sure

F3. Are you a Stein Roe Young Investor Fund shareholder?

- Yes
- No
- Not Sure

G. Knowledge Questions

G1. If a movie star has to pay federal income tax on \$3 million in income this year, about how much do you think this movie star will have to pay?

- \$70,000
- \$100,000
- \$400,000
- \$900,000

- \$1,500,000
- Not Sure

G2. Please pick the closest definition for a mutual fund from the choices below.

- An investment company that raises money from shareholders and invests in securities
- Debt instrument issued by a bank that usually pays interest.
- An interest bearing security that obligates the issuer to pay the holder a specified sum of money and repay principal amount a maturity.
- Ownership of a corporation represented by shares that are claims on the company's earning and assets.
- Not Sure

G3. Over twenty years' time, where would you expect to make the most money; the stock market, the bond market, or bank certificates of deposit (CDs)

- Stock Market
- Bond Market
- Bank Certificates of Deposit (CDs)
- Not Sure

G4. Do you think the federal deficit is good, bad, or has no effect on the economy:

- Good
- Bad
- No effect
- Not Sure

G5. What percentage of American adults do you think are currently out of work?

- Less than 1%
- 1-5%
- 6-10%
- 11-15%
- 16-20%
- 21% or more
- Not Sure

G6. What percentage of American adults do you think make more than \$100,000 a year?

- Less than 1%

- 1-5%
- 6-10%
- 11-15%
- 16-20%
- 21% or more
- Not Sure

G7. At what age do you think that you will retire?

- Never
- Not Sure

H. Demographic Questions

H1. Are you:

- Male
- Female

H2. How old are you?

H3. How often do you surf the web?

- Daily
- A few times a week
- Once a week
- A few times a month

H4. What do you think of the Young Investor Web Site?

- One of the best sites on the web
- Helpful in understanding money
- I would recommend it to my friends
- It sucks

H5. Will you come back to the Young Investor Web Site?

- Yes
- No
- Not sure
- Only if I win a great prize

H6. What is your main computer?

- Intel-based PC
- Apple Macintosh

Other

I. Entry Form

If you are chosen as a winner in the quarterly drawing, which prize would you like?

- Connectix color digital video camera
- CD ROM drive
- Flatbed scanner

Would you like to be added to the Young Investor email newsletter?

- Yes
- No

* Must be completed to get our newsletter	
First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Street Address *	<input type="text"/>
City *	<input type="text"/>
State *	<input type="text"/> Zip Code * <input type="text"/>
Country	<input type="text"/>
E-Mail Address *	<input type="text"/>

This information will only be used to contact you if you win.
[Take me back to the Measure Up Survey Page](#)