



Organize This! Participant Survey

Date: _____

Instructions: For each statement, circle one number to indicate how strongly you agree before participating in Organize This! and one number to indicate how strongly you agree after participating in Organize This!.

1 = Strongly Disagree, 2 = Disagree, 3 = Neither Agree nor Disagree, 4 = Agree, 5 = Strongly Agree

BEFORE Circle one number for each statement					Statements	AFTER Circle one number for each statement				
Strongly Disagree	Disagree	Neither	Agree	Strongly Agree		Strongly Disagree	Disagree	Neither	Agree	Strongly Agree
1	2	3	4	5	I understand what happens if someone dies without a will.	1	2	3	4	5
1	2	3	4	5	I understand the duties and responsibilities of a fiduciary.	1	2	3	4	5
1	2	3	4	5	I understand circumstances that could leave an adult incapacitated.	1	2	3	4	5
1	2	3	4	5	I know when to seek assistance from legal or financial professionals.	1	2	3	4	5
1	2	3	4	5	I have the documents needed for someone to manage my finances.	1	2	3	4	5
1	2	3	4	5	I have the documents needed for someone to manage my health.	1	2	3	4	5
1	2	3	4	5	I review my legal paperwork periodically.	1	2	3	4	5
1	2	3	4	5	I feel comfortable discussing caregiving and end-of-life with others.	1	2	3	4	5
1	2	3	4	5	My fiduciary knows where to find my important documents.	1	2	3	4	5
1	2	3	4	5	I can locate my important papers when I need them.	1	2	3	4	5

Overall, how much did you learn during the Organize This! program? Circle One.

Learned Nothing

Learned a little

Learned a moderate amount

Learned quite a bit

Learned a great deal

List the three most valuable things you learned in Organize This!:

1.

2.

3.

Please select any actions you have taken since participating in the Organize This! Program (choose all that apply).

- ☐ Located and gathered important personal, legal, or financial documents
- ☐ Reviewed existing legal or estate planning documents
- ☐ Identified, selected, or spoken with a fiduciary or trusted decision-maker
- ☐ Discussed caregiving preferences or end-of-life wishes with family or others
- ☐ Consulted with a legal or financial professional
- ☐ Created or updated a power of attorney
- ☐ Created or updated a will
- ☐ Created or updated a trust
- ☐ Completed an advance directive (such as a health care power of attorney)
- ☐ Organized important documents in a designated location
- ☐ Shared the location of important documents with a trusted person
- ☐ Other (please specify):

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