

Guide for Completing the Regional Silver Inclusion Survey (RSIP)

Thank you for participating in this survey!

This survey is part of the **Silver Finance: Financial Inclusion for Life** project, a joint initiative between the German Sparkassenstiftung and IDB Lab, which aims to improve and expand financial inclusion for people over 60 in Latin America and the Caribbean (LAC).

The purpose of this survey is to **collect key information on this age group's access to and use of financial services**, as well as to learn about initiatives already being implemented in the region to meet their needs.

One of the main challenges facing silver finance is the lack of available data. That is why your participation is essential to identify opportunities for improvement and move towards a more equitable financial inclusion for older adults.

Below are some guidelines to facilitate the process of completing the survey.

Access to the survey

This is a **digital survey** that has been designed to be user-friendly, with a focus on ease of completion and quick processing of responses.

The survey can be completed on **mobile devices or computers**. For greater convenience, we suggest completing it on a computer.

To complete the survey, click on the following link:

<https://s.alchemer.eu/s3/8a94cadd408e>

Or scan the following QR code:



If you have any problems with the link or filling out the information, you can contact us at:
pamela.afcha@dsik.org

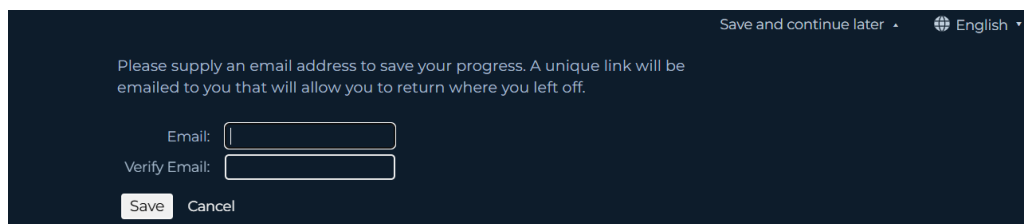
General instructions for filling out the survey

For a better understanding and navigation throughout the survey, it is important to consider the following:

- The survey consists of 27 questions divided into four sections:
 - **General information.**
 - Financial Inclusion **Access Indicators.**
 - Financial Inclusion **Usage Indicators.**
 - **Other initiatives.**
- The survey has the option to “**save and continue later.**” This option is displayed in the upper right corner once the “General Information” section has been completed. You can also choose the language in which to answer the survey; the available languages are Spanish and English.



When you select the “**save and continue later**” option, the platform will ask for an email address to which a link will be sent to continue the survey on a later date:

A screenshot of a dark blue form for saving progress. At the top right, it says 'Save and continue later' and 'English'. The main text says: 'Please supply an email address to save your progress. A unique link will be emailed to you that will allow you to return where you left off.' Below this, there are two input fields: 'Email:' and 'Verify Email:'. At the bottom left, there are two buttons: 'Save' and 'Cancel'.

- **Section II – Use of financial services**, includes questions requiring **quantitative data and additional calculations**, such as segmentation by age range, gender, and product type. We recommend **downloading the full survey** and reviewing the relevant questions in advance to facilitate these calculations. All quantitative data must be calculated as of **December 31, 2024.**
- Question fields marked with an asterisk* (most questions in the survey have one) are mandatory.

- The survey automatically validates responses before moving on to the next section. If there is an error, the platform will request responses that do not meet the defined criteria to be reviewed before moving to the next section.
- You can use the “**Next**” and “**Back**” buttons to move between the different sections of the survey once all questions in the section have been answered. You can go back and review your answers before submitting them.

Back	Next
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- Once you have completed the survey, click on the “**Submit**” button to record your answers. You will receive confirmation on the screen when the survey has been successfully submitted.

Submit

Estimated time

- The time to complete the survey is approximately **35 minutes**, assuming the quantitative calculations for the “**Financial Inclusion Usage Indicators**” section have already been calculated. The time required for these calculations may vary depending on each financial institution’s reporting systems and organizational structure.

Privacy and confidentiality

- The information shared in the survey will be treated with absolute confidentiality and used solely for the purposes of this project's analysis.

If you encounter technical difficulties, require clarification, or have questions about the use of the data, please write to us at: pamela.afcha@dsik.org

Thank you for your time and participation!

Your information is essential to promoting more equitable financial inclusion.