

2010 TreasuryDirect® Customer Survey

OMB No. 1535-0122

Welcome to the 2010 TreasuryDirect Customer Survey. Thank you for participating in this important effort. Your candid feedback is essential for us to improve our level of online services.

Confidentiality. Your personal responses will remain confidential, as TreasuryDirect survey responses are only published in aggregate form. To protect your identity, this survey does not ask for personally identifiable information, so please do not provide your name or TreasuryDirect account number.

*****PAPER ONLY*****

Due Date. Please return your survey by _____ in the enclosed postage-paid envelope or by fax to _____. Or, you may complete the survey online at _____. Your password to begin the survey is _____. The survey takes about 9 minutes to complete.

*****WEB ONLY*****

Navigation. Please use the 'Previous Page' and 'Next Page' buttons to navigate within the site. If you cannot finish in one session, simply close your web browser; the site will save your responses. Later, you can click the link in your invitation e-mail and enter your password to resume. When you are finished, click 'Submit' at the end of the survey to send your responses. The survey takes about 9 minutes to complete.

Questions? For questions about the survey, contact our survey contractor, ASR Analytics, by phone at 1-800-XXX-XXXX or by e-mail at TreasuryDirect2010Survey@asranalytics.com. For questions about your TreasuryDirect account, go to www.treasurydirect.gov and click the "Contact Us" link at the top of the page.

Investment Practices

1. **What types of financial investments do you currently own?** *(select all that apply)*

- U.S. Treasury Bills, Notes, Bonds, or Treasury Inflation-Protected Securities (TIPS) - GO TO Q3
- U.S. Savings Bonds - GO TO Q3
- Bank-type products such as savings, money market, certificates of deposit
- Employer retirement savings plan such as 401K, Thrift Savings Plan (TSP), Employee Stock Ownership Plan (ESOP), Simplified Employee Pension (SEP)
- Individual retirement savings plan such as IRA or Roth IRA
- College savings/529 plan
- Preferred/common stock
- Mutual funds or Exchange-Traded Funds (ETFs)
- Municipal/corporate bonds
- Real estate
- None
- Other: _____

2. **Have you ever bought Treasury securities—including U.S. Savings Bonds—from any source?** *(select only one)*

- Yes
- No - SKIP Q3

3. **During the last 12 months, which of the following Treasury securities have you bought?** *(select all that apply)*

- U.S. Savings Bonds
- U.S. Treasury Bills
- U.S. Treasury Notes
- U.S. Treasury Bonds
- Treasury Inflation-Protected Securities (TIPS)

None

4. IF Q1 = "U.S. TREASURY BILLS, NOTES, BONDS, TIPS": **Where do you hold Treasury bills, notes, bonds, or Treasury Inflation-Protected Securities (TIPS)?** (select all that apply)

- Broker/dealer account (through a mutual fund or investment company)
- Bank, savings & loan, or credit union account
- Retirement account
- TreasuryDirect account
- Legacy Treasury Direct account
- Don't know

5. IF Q1 = "U.S. SAVINGS BONDS": **Which of the following statements describe the savings bonds that you own?** (select all that apply)

- I have paper savings bonds.
- I have savings bonds in TreasuryDirect.

6. GROUPS A-C: **To the best of your knowledge, approximately how much of your investment portfolio—including U.S. Savings Bonds—is held in TreasuryDirect?** (select only one)

- 0%
- 1 – 10%
- 11 – 25%
- 26 – 50%
- 51 – 99%
- 100%
- Don't know

7. GROUPS A-C: **When buying securities in TreasuryDirect, please tell us (A) how important each item is to you and (B) how satisfied you are with each item.**

	(A) IMPORTANCE			(B) SATISFACTION			
	Very Important	Somewhat Important	Not at all Important	Very Satisfied	Somewhat Satisfied	Not Very Satisfied	Not at all Satisfied
a. Safety of website	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄
b. Convenience of online account	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄
c. Direct-hold relationship with U.S. Treasury	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄
d. Registration options for entities (such as trusts, estates and businesses)	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄
e. 24/7 online account access	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄
f. Ease of account use	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄

8. GROUPS A-C: **Please use the space provided below to comment on any of the above items.**

9. GROUPS B-D: **Which of the following statements describe why you haven't bought securities in TreasuryDirect in the last two years (or ever)?** (select all that apply)

- I'd rather buy U.S. Savings Bonds in paper form.
- I'd rather buy U.S. Treasury securities through a financial institution or my employer.
- I prefer other investment options.
- I don't find the interest rates attractive.
- I don't find my TreasuryDirect account easy to use.
- My TreasuryDirect account is new; I haven't used it yet.
- I don't have funds to invest at this time.
- Other: _____

10. **How likely are you to buy securities—including savings bonds—in TreasuryDirect during the next 12 months?** (select only one)

- Very likely
- Somewhat likely
- Not very likely - GROUP A GO TO Q11
- Not at all likely - GROUP A GO TO Q11
- Don't know

11. GROUP A if responded "Not very likely" or "Not at all likely" in Q10: **Why are you unlikely to buy securities in TreasuryDirect during the next 12 months?** (select all that apply)

- I'd rather buy U.S. Savings Bonds in paper form.
- I'd rather buy U.S. Treasury securities through a financial institution or my employer.
- I prefer other investment options.
- I don't find the interest rates attractive.
- I don't find my TreasuryDirect account easy to use.
- I don't have funds to invest at this time.
- Other: _____

Navigating Your TreasuryDirect® Account

12. **From the list provided below, please select all of the reasons you typically access your TreasuryDirect account.** (select all that apply)

- Make or schedule a new purchase
- Schedule a reinvestment purchase
- Purchase a gift savings bond
- Schedule a redemption payment
- Update account information such as my banking instructions, e-mail address, etc.
- Check interest rates
- Check the current value of my holdings
- Update financial records such as my portfolio or balance sheet
- Other: _____

13. **On recent visits to your TreasuryDirect account, how easy or difficult was it to find information you needed?** (select only one) - **REQUIRED**

- Very easy - GO TO Q16
- Somewhat easy - GOTO Q16
- Somewhat difficult
- Very difficult
- Not applicable - GO TO Q16

14. If responded "Somewhat difficult" or "Very difficult" in Q13: **Which of the following difficulties did you experience in attempting to find information in TreasuryDirect?** (select all that apply)

- Organization of information was confusing
- Too much non-essential information
- Error messages were confusing
- 'Back' or 'Forward' button ended my session
- Pending transactions were difficult to locate
- Tax statements were difficult to locate
- Navigational buttons, tabs and links weren't helpful
- Too many clicks to reach the information
- 'Help' function didn't address my concern
- Terminology wasn't clear
- Information I needed wasn't in TreasuryDirect
- Other: _____

15. If responded "Somewhat difficult" or "Very difficult" in Q13: **What information were you looking for?**

Opening and Managing Your TreasuryDirect® Account

16. Based on your most recent experiences with TreasuryDirect, please indicate how satisfied you were with each of the following items.

	Very Satisfied	Somewhat Satisfied	Not Very Satisfied	Not at all Satisfied	N/A
a. Ease of setting up your TreasuryDirect primary account	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/>
b. Using a minor-linked account (which is an account for your child that is linked to your primary account)	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/>
c. Using a custom-linked account (which is an account for a specified purpose, like "Jane Doe's College Fund," that is linked to your primary account)	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/>
d. Updating your account information such as address or password	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/>
e. Updating your bank information	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/>

17. Please use the space below to add any comments regarding your satisfaction with the above items:

Buying Securities and Other TreasuryDirect® Transactions

18. Based on your most recent experiences with TreasuryDirect, please indicate how satisfied you were with each of the following items.

	Very Satisfied	Somewhat Satisfied	Not Very Satisfied	Not at all Satisfied	N/A
a. Buying securities in TreasuryDirect	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/>
b. Buying savings bonds in TreasuryDirect to deliver as gifts	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/>
c. Converting your <i>paper</i> savings bonds to electronic form in your TreasuryDirect account	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/>
d. GROUPS A-C: Using a repeat purchase schedule to buy securities	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/>
e. GROUPS A-C: Reinvesting your marketable securities held in TreasuryDirect	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/>
f. GROUPS A-C: Transferring your securities into, out of, or among TreasuryDirect accounts	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/>
g. GROUPS A-C: Selling your marketable securities through SellDirect SM . (When you request SellDirect for marketable securities held in TreasuryDirect, TreasuryDirect arranges a sale through a broker.)	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/>

19. Please use the space below to add any comments regarding your satisfaction with the above items:
-

Customer Service

20. In the last two years, approximately how many times did you contact TreasuryDirect customer service for assistance? *(select only one)*

- 0 - GO TO Q24
- 1 – 2 times
- 3 – 5 times
- More than 5 times
- Don't recall - GO TO Q24

21. In the last two years, how did you contact TreasuryDirect customer service? *(select all that apply)*

- E-mail
- Telephone
- Postal mail
- Don't recall

22. Based on your overall experience with TreasuryDirect's customer service, please indicate how satisfied you were with each of the following items.

	Very Satisfied	Somewhat Satisfied	Not Very Satisfied	Not at all Satisfied
a. Helpfulness of the customer service representative	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄
b. Promptness of the customer service	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄
c. Courteousness of the customer service representative	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄

23. Please use the space below to add any comments regarding your satisfaction with the above items:
-

Security

24. How satisfied are you with TreasuryDirect account security features (e.g., the access card, the virtual keyboard, and e-mail alerts for sensitive transactions)? *(select only one)* - **REQUIRED**
- Very satisfied
 - Somewhat satisfied
 - Not very satisfied
 - Not at all satisfied
25. How satisfied are you with the login process? *(select only one)*
- Very satisfied
 - Somewhat satisfied
 - Not very satisfied
 - Not at all satisfied
26. How does TreasuryDirect account security compare with other financial websites you use? TreasuryDirect is ... *(select only one)*
- More secure
 - About the same
 - Less secure
 - Don't know

Overall Satisfaction

27. Overall, how satisfied are you with your TreasuryDirect account? *(select only one)* - **REQUIRED**
- Very satisfied
 - Somewhat satisfied
 - Not very satisfied
 - Not at all satisfied

Looking Forward

28. TreasuryDirect would like your feedback regarding possible new services and features. Please indicate the extent to which each of the following features appeals to you.

	Very Appealing	Somewha t Appealing	Not Appealing
a. Live chat for online help from a TreasuryDirect representative	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
b. Automated phone service for purchases and reinvestments	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
c. Personal access via mobile devices	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
d. Compatibility with financial software	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
e. E-mail confirmations for transactions	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
f. 'Select all' options when redeeming savings bonds	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
g. Search functionality within your account	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃
h. Auto-advance to the next field when entering dates, phone numbers, or Taxpayer ID Number	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃

29. Do you use any of the following social networking tools? *(select all that apply)*

- Facebook
- Twitter
- Flickr
- MySpace
- LinkedIn
- YouTube
- Vimeo
- Google or Yahoo! groups
- Del.icio.us
- RSS feeds
- None - GO TO Q32
- Other: _____

30. How helpful would it be to you if TreasuryDirect were to offer information/support via social networking tools? *(select only one)*

- Very helpful
- Somewhat helpful
- Not helpful - GO TO Q32
- Don't know - GO TO Q32

31. How would you envision using these tools with your TreasuryDirect account? *(select all that apply)*

- Get TreasuryDirect alerts/updates
- Get answers to questions/problems from a TreasuryDirect blog
- Contact customer service
- Provide feedback to TreasuryDirect
- Subscribe to an RSS feed for TreasuryDirect
- Other: _____

Demographics

If you are representing an entity, please skip to question 39.

32. **What is your gender?** *(select only one)*
- Male
 - Female
33. **What is your age?** *(select only one)*
- Under 25
 - 25-34
 - 35-44
 - 45-54
 - 55-64
 - 65-74
 - 75-84
 - Over 84
34. **What is your current marital status?** *(select only one)*
- Married
 - Not Married
35. **How many children under 18 years old live in your household?** *(select only one)*
- None
 - 1
 - 2
 - 3
 - 4 or more
36. **Which best describes your current employment status?** *(select only one)*
- Full-time
 - Part-time
 - Retired
 - Unemployed
37. **What is the highest level of formal education you have completed?** *(select only one)*
- Less than high school
 - High school or equivalent/GED
 - Some college or trade school
 - Bachelor's degree
 - Graduate or post-graduate degree
 - Other: _____
38. **What is your gross (pre-tax) annual household income?** *(select only one)*
- Under \$25,000
 - \$25,000 to \$49,999
 - \$50,000 to \$74,999
 - \$75,000 to \$99,999
 - \$100,000 to \$149,999
 - \$150,000 to \$249,999
 - Over \$249,999

39. TreasuryDirect would like your feedback on ways to improve current services and on new features that interest you. Please provide your comments on any aspect of TreasuryDirect or this survey. Thank you for your time.
-

PRIVACY ACT AND PAPERWORK REDUCTION ACT NOTICE. This survey has been approved by the Office of Management and Budget, as required by the Paperwork Reduction Act of 1995, under control number 1535-0122.

The collection of information you are requested to provide on this questionnaire is authorized by Executive Order 12862, Setting Customer Service Standards. The purpose of requesting the information is to ensure the Federal Government provides quality service to the American people. It's voluntary that you provide the requested information. Information concerning you, your securities holdings, and transactions is considered confidential under Treasury regulations (31 CFR Part 323) and the Privacy Act. However, a routine use of this information includes disclosure to agents and contractors who assist us in the management of the public debt.

We estimate the time required to fill out this questionnaire will average 9 minutes. However, you are not required to provide the information requested unless a valid OMB control number is displayed on the form. Send comments regarding this burden estimate or any other aspects of this collection of information, including suggestions for reducing the response time, to the Bureau of the Public Debt, Forms Management Officer, Parkersburg, WV 26106-1328.

TreasuryDirect® is a registered mark of the Department of the Treasury

Version 13.0 – January 20, 2010