
Attachment 1: DRAFT Retirement Plan Distribution Phone Forum Survey

Thank you for verifying the below information.

*First Name: _____
*Last Name: _____
*Email Address: _____
PIN Number: _____

All fields with an asterisk () are required.*

**Welcome to the IRS Employee Plans (EP) [Insert Month and Day of Forum, 2010]
[Insert Forum Topic] Phone Forum Survey!**

We are looking for feedback on your participation in the IRS EP [Insert Month Day, 2010] [Insert Topic] Phone Forum. IRS EP is conducting a brief, voluntary survey to obtain your opinions on a range of issues relevant to the EP Phone Forum referenced above. Your participation in this survey will greatly assist us in making our phone forums more responsive to your needs and interests. The responses you provide on this survey will not be disclosed to any other individuals.

The survey consists of fourteen questions, and should take approximately five minutes to complete. We thank you in advance for completing this survey and look forward to future improvements to our phone forums.

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests along with the address where you can send comments regarding the study. The OMB number for this study is 1545-1432. If you have any comments regarding this study, please write to:

**IRS, Tax Products Coordinating Committee
SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW
Washington, DC 20224**

1. Why did you participate in the Retirement Plans Distribution Phone Forum (check all that apply)?

Needed CPE credit Topic was of interest My office encouraged participation Other:

Select all that apply.

Please respond to the following statements by selecting the response that best matches your opinion. Your answer should reflect your opinion only, not the opinions of colleagues that may have participated in the call with you.

2. The topic (Retirement Plans Distribution) was interesting.

Strongly Disagree Moderately Disagree Slightly Disagree Neither Agree nor Disagree Slightly Agree Moderately Agree Strongly Agree

Select one.

3. The topic (Retirement Plans Distribution) was informative.

Strongly Disagree Moderately Disagree Slightly Disagree Neither Agree nor Disagree Slightly Agree Moderately Agree Strongly Agree

Select one.

4. The speakers presented the information clearly.

Strongly Disagree Moderately Disagree Slightly Disagree Neither Agree nor Disagree Slightly Agree Moderately Agree Strongly Agree
Select one.

5. I did not have any problems registering for the phone forum with AT&T.

- Strongly Disagree
- Moderately Disagree
- Slightly Disagree
- Neither Agree nor Disagree
- Slightly Agree
- Moderately Agree
- Strongly Agree

Select one.

6. I did not have any problems dialing-in with AT&T to participate in the phone forum.

Strongly Disagree Moderately Disagree Slightly Disagree Neither Agree nor Disagree Slightly Agree Moderately Agree Strongly Agree
Select one.

7. The length of the phone forum was appropriate.

8. Was the phone forum too long or too short?

Too long Too short

Select one.

9. Will you recommend the phone forums to your colleagues?

Yes No (Answer question number 9.1.)

Select one.

9.1. If you will not recommend the phone forums to your colleagues, please provide an explanation below.

10. Do you have any suggestions for future phone forum topics?

10.1. What topic or topics would you like to be discussed in future phone forums?

11. How did you find out about the Retirement Plans Distribution Phone Forum?

Retirement Plans Newsletter Coworker www.irs.gov Other:

Select one.

12. Which of the following best describes you?

Benefits Practitioner Tax Practitioner Employer/Plan Sponsor Employee Other:

Select all that apply.

12.1. Approximately how many employees are in your organization?

13. Were any of the questions difficult to understand?

YesNo

Select one.

13.1. Please identify the question(s) you found difficult to understand and explain why.

14. Do you have any additional comments or concerns regarding the Retirement Plans Distribution Forum?

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Attachment 2: DRAFT Survey Email Invitation

Dear [First Name],

On [Date], you participated in the [Forum Topic] Phone Forum. We thank you for your involvement in this forum. You are invited to complete a brief, online survey about your participation. The purpose of this survey is to gather information that will be useful for partaking in future IRS Employee Plans phone forums. The responses you provide on this survey will not be disclosed to any other individuals.

We realize that some time has passed since your participation in the phone forum referenced above. Please answer to the best of your recollection. Your feedback is extremely valuable in our efforts to improve future EP phone forums. We appreciate your response and we hope you are able to take a few minutes to complete this survey.

We look forward to your participation in this survey.

Please click the link below to complete the survey.

<http://guest.cvent.com/v.aspx?3B,P1,00000000-0000-0000-0000-000000000000>

Sincerely,

Teresita Laureano

IRS-Employee Plans

Having trouble with the link? Simply copy and paste the entire address listed below into your web browser:

<http://guest.cvent.com/v.aspx?3B,P1,00000000-0000-0000-0000-000000000000>

If you no longer want to receive emails from Teresita Laureano please click on the link below.

<http://guest.cvent.com/v.aspx?5C,S1,00000000-0000-0000-0000-000000000000>

Powered by Cvent

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Attachment 3: DRAFT Survey Reminder Email

Dear [First Name],

This is a reminder that you have not accepted the recent email invitation to complete the IRS Employee Plans (EP) – [Forum Topic] Phone Forum Survey. The brief, online survey will gather information about your involvement in the [Date], EP – [Forum Topic] Phone Forum. Please know that your feedback is extremely valuable in our efforts to improve future EP phone forums. The survey should only take a few minutes to complete, and your responses will not be disclosed to any other individuals.

We know your time is valuable and appreciate your feedback. Thank you for your time. Please click on the link below to begin the survey.

<http://guest.cvent.com/v.aspx?3B,P1,488E5266-7CF1-47FF-8332-5F12783C555B>

Sincerely,
Teresita Laureano
IRS-Employee Plans

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