

Invitation Script (last paragraph):



Department of the Treasury  
Internal Revenue Service

### ERPA-Special Enrollment Examination Part I: Compliance and Operations Issues

#### CANDIDATE INSTRUCTIONS:

You have three hours (3) to complete the examination, and you should gauge your time accordingly.

There are 75 questions on this examination part. They appear in the following formats.

**Straight Answer or Calculation** - Questions are followed by five statements or numeric answers (lettered A - E). Choose the one answer which you feel is most appropriate.

**Which of the Following...Single Choice** - Questions are followed by five statements or numeric answers (lettered A - E), which include a single true statement and four false statements. Choose the one answer which you feel is most appropriate.

**All But** - Questions contain the word EXCEPT or TRUE, EXCEPT. The statements include four true statements and one false statement. Choose the statement (lettered A-E) which you feel would be the most appropriate exception.

**Triple True-False** - Questions are followed by a series of statements numbered I, II, and III. Choose the answer (lettered A - E) which contains the roman numeral or combination of roman numerals which you feel is most appropriate.

Each question is weighted equally. Wrong or omitted answers will receive no credit. Therefore, there is no advantage to leaving an answer blank.

Each question is presented one at a time. Once you decide the best response, enter it by using the keyboard or the mouse. The computer will show the response so you know which one has been selected. To move to the next question hit the "next" button. If you are unsure about a question, you can "mark" it for review at a later time during the examination period.

After you have answered all questions, if you wish to review your examination, the questions will appear on the screen and show the answer you chose. You can choose to change an answer, or answer a question you had skipped.

Upon completing the review, please press the "End" button to end the examination. A short survey will follow the examination. Survey answers have no effect on the grading of the examination.

NEXT

QUIT

## Script from first screen of survey

*Your examination session is completed.*

*Please respond to the brief exit survey. Your feedback is important to us. This survey is voluntary and should take approximately three minutes.*

*The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1432. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.*

# ERPA-SEE Survey

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1. What was the PRIMARY motivation in becoming an ERPA?
  - A. To represent clients before the IRS
  - B. Company requirement
  - C. Promotion, salary, or bonus purposes
  - D. To increase pension knowledge
  - E. Other, please indicate:
  
2. How satisfied are you with the usefulness and accuracy of the ERPA examination website?
  - A. Very satisfied
  - B. Satisfied
  - C. Uncertain
  - D. Dissatisfied
  - E. Very Dissatisfied
  
3. What was your PRIMARY form of preparation for this examination?
  - A. ERPA Syllabus
  - B. ERPA Study Guide
  - C. ERPA Licensure Information Bulletin
  - D. *The ERISA Outline Book*
  - E. AIRE Recorded Review Session(s)
  - F. AIRE Live Review Session(s)
  - G. AIRE Practice Examination
  - H. Study Group
  - I. Other, please indicate:
  
4. What resources did you use to prepare for this examination? (check all that apply)
  - ERPA Syllabus
  - ERPA Expanded Syllabus (Study Guide)
  - ERPA Licensure Information Bulletin
  - The ERISA Outline Book*
  - AIRE Recorded Review Session(s)
  - AIRE Live Review Session(s)
  - AIRE Practice Examination
  - Study Group
  - Other, please indicate:
  
5. In terms of difficulty, how would you rate this examination?
  - A. Very Easy
  - B. Easy
  - C. Average Difficulty
  - D. Difficult
  - E. Very Difficult
  
6. Was sufficient time allotted to complete the examination?
  - A. Yes
  - B. No
  - C. Unsure
  
7. How many total hours of studying did you spend preparing for this examination?
  - A. 40 or Less
  - B. 41-80
  - C. 81-120
  - D. 121-210
  - E. Over 210
  
8. Please indicate below if you are any of the following (check all that apply):
  - A. Registered Tax Return Preparer
  - B. Enrolled Agent

- C. Enrolled Actuary
- D. Certified Public Accountant
- E. Attorney
- F. ASPPA credentialed member
- G. NIPA credentialed member
- H. None of the above
- I. Other, please indicate:

9. Please indicate below which BEST fits your job description:

- A. Plan administration/recordkeeping
- B. Actuarial
- C. Consulting/Client relations
- D. Customer Service/Call Center
- E. Marketing/Sales/Investment Advisor
- F. Other

10. How many years have you been practicing in the retirement plan benefits field?

- A. 0-2
- B. 3-5
- C. 6-9
- D. 10-15
- E. Over 15

11. Are you planning on attending the annual ERPA Conference for Continuing Education (CE) credits purposes?

- A. Yes
- B. No
- C. Unsure

12. What can AIRE, LLC do to improve your experience or make future examinations more meaningful and beneficial to you?