



## Welcome and Thank You Text

### Welcome Text

Thank you for visiting Adviserinfo.sec.gov/IAPD. You've been randomly chosen to take part in a brief survey to let us know what we're doing well and where we can improve.

Please take a few minutes to share your opinions, which are essential in helping us provide the best online experience possible.

### Welcome Text - Tablet/Phone

### Thank You Text

Thank you for taking our survey - and for helping us serve you better. We appreciate your input!

### Thank You Text - Tablet/Phone

### Example Desktop

The desktop version of the survey features a white background with a red FORESEE logo at the top right. The title "Customer Satisfaction Survey" is centered. The text is left-aligned and includes a TRUSTe Certified Privacy logo. A survey question is displayed with a red zigzag line indicating a required question. At the bottom, there are "Cancel" and "Submit" buttons, copyright information, and links to ForeSee, ForeSee Privacy Policy, and Contact Us.

**FORESEE**

### Customer Satisfaction Survey

Thank you for visiting our site. You've been randomly chosen to take part in a brief survey to let us know what we're doing well and where we can improve.

Please take a few minutes to share your opinions, which are essential in helping us provide the best online experience possible.

Required questions are denoted by an \*

**TRUSTe**  
Certified Privacy

\*Please rate the extent to which the products on this website appeal to you.

disag. ee

Thank you for taking our survey - and for helping us serve you better.

Please note you will not receive a response from us based on your survey comments. If you would like us to contact you about your feedback, please visit the Contact Us section of our web site.

Copyright 2016 - all rights reserved

[ForeSee](#) [ForeSee Privacy Policy](#) [Contact Us](#)

### Example Mobile

The mobile version of the survey is displayed in a white box with a red FORESEE logo at the top right. The text is left-aligned and includes a TRUSTe Certified Privacy logo. A survey question is displayed with a red zigzag line indicating a required question. At the bottom, there are "Cancel" and "Submit" buttons, and links to ForeSee, ForeSee Privacy Policy, and Contact Us.

**FORESEE**

Thank you for visiting our site. You've been selected to participate in a brief survey to let us know how we can improve your experience. Please take a minute to share your opinions.

**TRUSTe**  
Certified Privacy

Required questions are denoted by an \*

Please rate the extent to which the products on this website appeal to you.

disag. ee

Thank you for taking our survey - and for helping us serve you better.

[ForeSee](#)  
[ForeSee Privacy Policy](#)  
[Contact Us](#)

Model Name: Advisor Info Browse  
 Model ID (MID):  
 Partitioned: Yes - 2MQ  
 Date: 4/27/2016

~~Red & Strike-Through~~: Delete  
Underlined & Italicized: Re-order  
 Pink: Addition  
 Blue: Reword



Label	Element Questions	Label	Satisfaction Questions	Label	Future Behaviors
	<b>Look and Feel (1=Poor, 10=Excellent, Don't Know)</b>		<b>Satisfaction</b>		<b>Recommend Site (1=Very Unlikely, 10=Very Likely)</b>
1 Look and Feel - Appeal	Please rate the <b>visual appeal</b> of this site.	16 Satisfaction - Overall	What is your <b>overall satisfaction</b> with this site? <i>(1=Very Dissatisfied, 10=Very Satisfied)</i>	19 Recommend Site	How likely are you to <b>recommend this site</b> to someone else?
2 Look and Feel - Balance	Please rate the <b>balance of graphics and text</b> on this site.	17 Satisfaction - Expectations	How well does this site <b>meet your expectations</b> ? <i>(1= Falls Short, 10=Exceeds)</i>		<b>Return (1=Very Unlikely, 10=Very Likely)</b>
3 Look and Feel - Readability	Please rate the <b>readability of the pages</b> on this site.	18 Satisfaction - Ideal	How does this site <b>compare to your idea of an ideal website</b> ? <i>(1=Not Very Close, 10=Very Close)</i>	20 Return	How likely are you to <b>return to this site</b> in the future?
	<b>Site Performance (1=Poor, 10=Excellent, Don't Know)</b>			21 Seek More Information	<b>Seek More Information (1=Very Unlikely, 10=Very Likely)</b>
4 Site Performance - Loading	Please rate how <b>quickly pages load</b> on this site.				How likely are you to <b>seek out more information</b> about investment professionals and potential investments as a result of visiting this site?
5 Site Performance - Consistency	Please rate the <b>consistency of speed from page to page</b> on this site.				
6 Site Performance - Completeness	Please rate how <b>completely the page content loads</b> on this site.				
	<b>Navigation (1=Poor, 10=Excellent, Don't Know)</b>				
7 Navigation - Organized	Please rate <b>how well this site is organized</b> .				
8 Navigation - Options	Please rate the <b>options available for navigating</b> this site.				
9 Navigation - Layout	Please rate <b>how well the site layout helps you find what you need</b> .				
	<b>Information Browsing (1=Poor, 10=Excellent, Don't Know)</b>				
10 Information Browsing - Sort	Please rate the ability to <b>sort information by criteria that are important to you</b> on this site.				
11 Information Browsing - Narrow	Please rate the ability to <b>narrow choices to find the information you are looking for</b> on this site.				
12 Information Browsing - Features	Please rate how well the <b>features on the site help you find the information you need</b> .				
	<b>Site Information (1=Poor, 10=Excellent, Don't Know)</b>				
13 Site Information - Thoroughness	Please rate the <b>thoroughness of information</b> provided on this site.				
14 Site Information - Understandable	Please rate how <b>understandable</b> this site's <b>information</b> is.				
15 Site Information - Answers	Please rate how well the site's <b>information provides answers to your questions</b> .				

Model Name Advisor Info Browse  
 Model ID (MID)  
 Partitioned Yes - 2MQ  
 Date 4/27/2016

Red & Strike-Through: Delete  
 Underlined & Italicized: Re-order  
 Pink: Addition  
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QID	QUESTION META TAG	Skip From	Question Text	Answer Choices	Skip To	Required Y/N	Type	Special Instructions	CQ Label
			How frequently do you visit this site?	This is my first visit Daily Weekly Monthly Every few months Once every six months or less often		Y	Radio button, one-up vertical		Visit Frequency
			Which category best describes you?	Individual Investor Financial Advisor or Investment/Securities Professional Student Teacher/Academic Attorney Media/Press General Public Other		Y	Radio button, one-up vertical	Skip Logic Group*	Role
		A	Please briefly describe your role:			N	Text field, <100 char	Skip Logic Group*	Other role
			What is your primary interest in visiting this site today?	Obtain basic or general information about investing Learn about investment scams or avoiding fraud Learn about fees for investment products and services Check out the background of an investment professional Use one of the investment Calculators Other		Y	Radio button, one-up vertical	Skip Logic Group*	Primary Reason
		A	Please briefly describe your primary interest in visiting this site today:			N	Text field, <100 char	Skip Logic Group*	Other reason
			Have you ever checked with a state or federal regulator regarding the background, registration, or license of a financial professional?	Yes No	A	Y	Radio button, one-up vertical	Skip Logic Group*	Learning
		A	Will your findings impact your decision to work with a particular investment professional?			N	Text field, <100 char	Skip Logic Group*	Broker Learning
			Did you learn something on Adviserinfo.sec.gov/IAPD that might impact your behavior in the future?	No Yes Maybe		Y	Radio button, one-up vertical	Skip Logic Group*	Learning
		A	Please specify what you learned:			N	Text area, no char limit	Skip Logic Group*	Learned
			How did you learn about Adviserinfo.sec.gov/IAPD?	Search engine (Google, Bing, etc.) Referred by SEC.gov Referred by another website, other than SEC.gov Radio Television IRS tax refund insert In-person event/conference Social media (Twitter, Facebook, etc.) News source (magazine/newspaper/radio/television) Referred by a friend or family member Prior visit Other		Y	Radio button, one-up vertical	Skip Logic Group*	How Found
		A	Please specify how you learned about Adviserinfo.sec.gov/IAPD:			N	Text area, no char limit	Skip Logic Group*	OE-Found
		B	Please describe the event/conference you attended.			N	Text area, no char limit	Skip Logic Group*	OE-Event Attended
			Did the site help you do what you wanted to do today?	Yes No Partially I wasn't looking for anything in particular		Y	Radio button, one-up vertical	Skip Logic Group*	Able to Accomplish
		A	Please specify what you were trying to do:			N	Text area, no char limit	Skip Logic Group*	Inable to Accomplish
			How did you look for the information you wanted / needed on this site? (select all that apply)	Used the navigation tabs/headings near the top of the home page Used the topic buttons on the main central part of the home page Used the site search feature Used the site map Already knew where to go on the site or had specific page bookmarked Not sure Other		Y	Checkbox, one-up vertical	Skip Logic Group*	Method of Looking
		A	What other method did you use to look for the information you wanted / needed?			N	Text area, no char limit	Skip Logic Group*	Other Method
			How would you describe your navigation experience on this site today? (Please select all that apply.)	I had no difficulty navigating/browsing on this site		Y	Checkbox, one-up vertical	Skip Logic Group*	Navigation

			Links often did not take me where I expected	A				
			Had difficulty finding relevant information					
			Links/labels are difficult to understand					
			Too many links/navigational options to choose from					
			Had technical difficulties (error messages, broken links, etc.)	B				
			Could not navigate back to previous information					
			I had a navigation difficulty not listed above:	C				
	A	Please describe any specific navigation links or paths that did not take you where you expected:			N	Text area, no char limit	Skip Logic Group*	OE_Nav Path
	B	Please describe which links were broken or had error messages:			N	Text area, no char limit	Skip Logic Group*	OE_Nav Link
	C	Please briefly describe your navigation difficulty:			N	Text area, no char limit	Skip Logic Group*	OE_Navigate
		Did you use any search features on this site today?	Yes	A	Y	Radio button, one-up vertical	Skip Logic Group*	Search Usage
			No					
	A	Please tell us about your experience with the site's search features today. (Please select all that apply.)	Search results were helpful		Y	Checkbox, one-up vertical	Skip Logic Group*	Search Experience
			Results were not relevant/not what I wanted					
			Too many results/I needed to refine my search					
			Not enough results					
			Returned NO results	B				
			Received error message(s)	C				
			Search speed was too slow					
			I experienced a different search issue (please explain):	C				
	B	What search term(s) did you use?			N	Text area, no char limit	Skip Logic Group*	OE_Search Terms
	C	Please describe the issues or errors you experienced with the search feature:			N	Text area, no char limit	Skip Logic Group*	OE_Search Issue
		If you could make one change/improvement to Adviserinfo.sec.gov/IAPD website, what would it be?			N	Text area, no char limit		Improvement