

MSEM Phone Screener

Phone-Based Screener (for those who qualify based on web-based screener)

Hello _____. Thank you for your interest in participating in our interviews about their role helping manage the finances of an older or disabled family member or friend who is no longer able to do it on their own. My name is _____ and I wanted to follow up regarding a screener that you completed recently for an upcoming study. I wanted to ask a couple more questions and see if we can schedule you. Your participation is completely voluntary. Do you have a few minutes?

{read the following to participant}

The information you provide through your responses to the Fors Marsh Group (FMG) will assist the study sponsor, the Consumer Financial Protection Bureau (“Bureau”), in confirming your eligibility for an upcoming interview assessing financial education materials related to the Managing Someone Else’s Money (MSEM) program.

Privacy Notice and Paperwork Reduction Act Statements

A federal law called the Privacy Act directs how the Bureau collects, keeps and shares your personal, private information- including the personal information contained in your answers to these questions. Your participation is completely voluntary and is subject to the Bureau’s privacy policy that can be found on our website, consumerfinance.gov. Another federal law called the Paperwork Reduction Act requires the Bureau to obtain approval from the federal government’s Office of Management and Budget (OMB) prior to conducting this survey. This survey has been approved by OMB under OMB number 3170-0024.

Q1. Would you please verify your age?

Q2. Would you please verify your role managing someone else’s money or your past experience?

[If respondent selected [f. Other] on Q8. recruiter will probe to learn more.

Q3. You selected ‘Other’ when it came to tasks to typically do to help another person with their finances? Could you please expand on your selection?

Q4. Would you please tell me more about the circumstances that led to you relinquishing your role?

Q5. If you were or are compensated for your role, please tell me more.

[If responses are confirmed – proceed with scheduling.]

Thank you for your time.