

Hello,

My name is [X] and I work for Davis Research. We are working with the RAND Corporation, a non-profit organization. We have been asked by the Consumer Financial Protection Bureau to help them learn more about how Your Money, Your Goals is being used by staff and with clients to help people better understand a range of financial topics. You participated in a training course about Your Money, Your Goals a few months ago.

We recently sent you an email to participate in an online survey about this program, and I am calling to encourage you to participate.

The survey is entirely online, so you can take it when it is convenient for you, and return to the survey if you don't have time to complete it in one sitting.

We can send the email to you again if you like, since it may have ended up in your spam folder.

[read] Privacy Notice

The information you provide will assist the Consumer Financial Protection Bureau gather data to understand how Your Money, Your Goals (YMYG) organizations integrate YMYG into their social service programs. You will be asked a series of open ended questions.

Participation is voluntary. You are not required to participate, and no identifying information will be collected.

Thank you for your time.

[if asked about purpose of survey]: We are looking to learn from you and others about what is working with Your Money, Your Goals, what is not working, and what CFPB might do differently moving forward to help ensure that the use of Your Money, Your Goals will affect changes in financial literacy. The Purpose is not to evaluate you or your organization. No quotes, opinions, or feedback will be linked to you or your organization in our reports or communication with CFPB.

[if asked about login] **To complete the survey, please go to www.ymygsurvey.org and enter your login ID of <INSERT LOGIN ID>.**