

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 organizations like XX can help people better understand a range of financial topics.

You recently agreed to provide your contact information in order to participate in two surveys, and I am calling to ask you to respond to the survey. You can complete the survey with me now or we can schedule another time that may work better for you. Or if you prefer, you can take the survey online.

You will receive \$22 for participating in the survey and it will take about 15 to 20 minutes.

Privacy Act Statement

5 U.S.C. 552a(e)(3)

The information you provide through your responses to Davis Research and the RAND Corporation will assist the study sponsor, the Consumer Financial Protection Bureau (CFPB or “Bureau”), in collecting feedback about consumers’ experiences receiving services at organizations that have been trained to use the Your Money, Your Goals (YMYG) toolkit and educational materials.

The CFPB will not obtain or access personally identifiable information. The Bureau will only obtain and access de-identified results and aggregated analyses of those results.

Information collected on behalf of the Bureau by Davis Research and the RAND Corporation will be treated in accordance with the System of Records Notice (SORN), CFPB.021 Consumer Education and Engagement Records SORN, 83 FR 23435. This information may be disclosed as outlined in the Routine Uses for the SORN. Direct identifying information will only be used by Davis Research and the RAND Corporation to facilitate the survey and will be kept private except as required by law.

This collection of information is authorized by Pub. L. No. 111-203, Title X, Sections 1013 and 1022, codified at 12 U.S.C. §§ 5493 and 5512.

Participation in this study is voluntary, you are not required to participate or share any identifying information with Davis Research or the RAND Corporation.

Thank you for your time.

[if asked about purpose of survey]: We are looking to learn from you and others about how XXX can help you make better decisions and how the CFPB can provide resources to this organization. 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 they prefer online] To complete the survey, please go to www.ymygsurvey.org and enter your login ID of <INSERT LOGIN ID>.

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

[if asked about responding at another time] If you prefer to respond at another time, we can call you back. When would be a good time for you