

# Communications Plan

## Managing Someone's Else's Money: Power of Attorney Guide

### Recruitment Communications Plan

The Office for Older Americans will send an opt-in email as well as post the following message to listservs that OA knows are relevant to targeted intermediaries in order to recruit intermediaries and consumers for the Managing Someone Else's Money study. Those who are interested in participating can reply and Fors Marsh Group and the User Research Team will schedule the interviews. In addition to the opt-in email, participants will receive a reminder email the day before their session.

### Introductory email to intermediaries/text for listserv postings

#### Email copy

I'm Erin Scheithe, a content specialist in the CFPB's Office for Older Americans. As you know, millions of Americans manage money or property for a loved one who's unable to pay bills or make financial decisions. To help financial caregivers, we released a series of easy-to-understand guides called Managing Someone Else's Money (MSEM).

The MSEM guides are one of the most popular CFPB publications, demonstrating their relevance and effectiveness. But the Office for Older Americans team believes it is important to test our materials regularly with our target audiences to see if they're still hitting the mark, and make improvements based on the feedback we receive. Are you and members of your team interested in reviewing and providing feedback on the guides in a structured interview? Are you able to help connect us with a few consumers who could participate?

We aim to interview about 12 consumers and 12 intermediaries/practitioners about the MSEM guide, either in person or by phone. The interviews would last one hour. We will send a copy of the [MSEM guide](#) to review before the interview. Our objective is to include practitioners from different professions, including financial institution employees, senior service providers and attorneys – both elder law focused attorneys and legal services attorneys. We hope to include consumers of all ages who have served as fiduciaries, informal financial caregivers, or those who may serve in this type of role in the future.

If you or members of your team are interested in helping us, please respond to this email. We will provide more detail on what to expect in the coming weeks.

Thank you,

Erin Scheithe

### Recruitment emails

#### Intermediaries

Subject line options

- Senior Service Providers needed for interviews about helping clients with financial caregiving
- Do you help your clients manage the money or property of a loved one who can no longer manage on their own?
- Do you help clients who manage money or property for an aging or disabled loved one? We want to talk to you!

**Email copy**

Hello,

Do you currently help people who are managing the money or property of an older or disabled family member/friend who is no longer able to manage on their own? Or do you currently work directly with older or disabled clients who need help managing their money or property?

The Consumer Financial Protection Bureau is looking to interview practitioners who are helping clients in their role as a fiduciary for an older or disabled friend or family member.

We will be conducting these interviews at [XXX enter site address XXX]. We may also be able to come to you, depending on our availability. Sessions will be 60 minutes and will be [face-to-face/remote].

If you are available and interested, please email us below and we'll get back to soon.

Thank you so much,

[name]

**Consumers**

Subject line: Paid study: Helping an older or disabled family member or friend manage their money?

**Email copy**

Hello,

Are you currently helping manage the money or property of an older or disabled family member or friend who is not able to do it on their own? Have you done it in the past? We want to talk to you!

The Consumer Financial Protection Bureau is looking to interview people about their experiences helping to manage the money or property of an older friend or family member who is not able to do it on their own.

We will be conducting these interviews at [XXX enter site address XXX]. We may also be able to come to you, depending on our availability. Sessions will be 60 minutes and will be [face-to-face/remote]. You will be paid [\$75.00 in the form of a VISA gift card] for your time.

If you are available and interested, please email us below and we'll get back to soon.

Thank you so much,

[name]

**Privacy Act Statement**  
**5 USC 552a(e)(3)**

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 order to determine eligibility for an interview about financial education materials related to the Managing Someone Else’s Money (MSEM) program.

The FMG will obtain and access identifying information such as your name, email address, phone number and certain demographic information. The Bureau will only obtain, and access, de-identified results and aggregated analyses of those results.

Information collected will be treated in accordance with the System of Records Notice (“SORN”), CFPB.021 – CFPB Consumer Education and Engagement Records, 85 FR 3662. Although the Bureau does not anticipate further disclosing the information provided, it may be disclosed as indicated in the Routine Uses described in the SORN. Direct identifying information will only be used to determine eligibility for the interview 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 is voluntary.