

### **Paperwork Reduction Act Statement**

According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor a collection of information, nor is a person required to respond to a collection of information unless it displays a valid OMB Control Number. The OMB Control Number for this information collection is 3170-0036. The time burden required to complete this collection of information is estimated to be 30 minutes per response. Comments regarding this collection of information (e.g comments regarding the time burden per response, suggestions for reducing the time burden per response, and/or suggestions for maximizing the utility of the collected information) should be submitted to the Consumer Financial Protection Bureau at [CFPB\\_PRA@cfpb.gov](mailto:CFPB_PRA@cfpb.gov).

## **The CFPB FinEx Practitioner Feedback on Consumer Voices Survey**

Welcome to the Consumer Financial Protection Bureau Financial Education Exchange (CFPB FinEx) financial practitioner survey: Voices of the consumers you serve.

We are interested in getting your feedback on what you are hearing from consumers and other stakeholders that you serve. This online survey will give us information about what you are hearing from consumers you are working with to improve their financial well-being. We are interested in hearing about new trends regarding consumers issues as well as what directions you would like us to take in the future in order to best support you in advancing the financial well-being of the people you serve.

The survey will take approximately 15-25 minutes to complete and is authorized by Dubis Correal, Office of Financial Education Staff Director. Your responses will remain anonymous and stored on a secure server. A third party tool Qualtrics will be used for the data collection process. Please feel free to be completely candid.

If you have any questions or feedback regarding the survey, please email [CFPB\\_FinEx@cfpb.gov](mailto:CFPB_FinEx@cfpb.gov).

If you require technical assistance with the survey, please email [CFPB\\_FinEx@cfpb.gov](mailto:CFPB_FinEx@cfpb.gov).

Privacy Notice: The information you provide will assist the Consumer Financial Protection Bureau (CFPB) to plan and revise CFPB financial education events and resources. No personally identifiable information (PII) will be collected using this survey. Information about your organization, including zip code and professional insights, will be collected during this survey; however, your feedback will not be used to re-identify you or linked to any direct identifiers.

Participation in this survey is voluntary, and you may opt-out at any time.

### **The term consumers/clients/customers will be used interchangeably in this survey.**

1. What is your organization's name?
2. What is your Organization's zip code?
3. What is the mission of your organization?
4. What is your role (as an individual professional working at your organization) in helping to achieve your organization's mission?

5. Who are your organization's primary consumers/clients/customers?
6. Which of these consumers/clients/customers do you work with as an individual professional?
7. Can you tell us the top issues, concerns, and requests that you have received from consumers/clients/customers that you provide services?
8. What types of products or services do you provide your consumers/clients/customers?
9. What are your organizations most requested products or services?
10. Do you use any of CFPB's resources to help you in your work with consumers/clients/customers?
11. If so, which resources do you use? (If not, skip question 10.)
12. What new pandemic related issues have you seen your clients/customers experience?
13. Are you seeing any new trend in requests from customers in recent weeks and months?
14. What are your organization's strengths in providing personal financial education and other services to consumers/clients/customers?
15. In which financial literacy education areas would you like to see CFPB do more to help?
16. What types of tools, services, products, publications, or other resources could the CFPB provide to enhance your organization's ability to service more consumers/clients/customers?
17. Is there anything else that you would like the CFPB to know about your clients needs or your organization's needs related to financial coaching, financial counseling, financial service providers, or other financial literacy issues?
18. Do you have any suggestions for topics for webinars that are created for financial practitioners?