



Department of the Treasury  
Internal Revenue Service  
P.O. Box 2608  
Washington, DC 20002

<<DATE>>

Dear Taxpayer:

The IRS needs your help with an important study we are undertaking to improve our service to America's taxpayers. We are trying to better understand how individuals make financial decisions about a range of topics such as managing money, getting a loan, saving for retirement, and paying taxes. Learning about your experience will help us to better understand the issues faced by taxpayers and how we can better assist them.

The study involves a one-hour one-on-one phone interview that will be conducted on behalf of the IRS by the Fors Marsh Group, an independent research company located in Arlington, VA. Your participation is voluntary. You can be certain that all information you provide will be used for research purposes only.

If you choose to participate, you will receive a \$75 gift card as a token of our appreciation. To participate, please go to the following link [IRSFinLitStudy.org](https://www.irs.gov/finlitstudy) and enter code <<CODE>>

Please note that participation is limited, and interviews will be scheduled on a first-come, first-served basis. To read the official IRS announcement regarding this study, please visit [www.irs.gov/statistics/2020-financial-literacy-study](https://www.irs.gov/statistics/2020-financial-literacy-study). You may also call 571-858-3750 if you have additional questions.

I hope you will decide to participate in the study.

Sincerely,

<<Signature>>

Barry W. Johnson  
Acting Chief Research & Analytics Officer  
Research, Applied Analytics & Statistics (RAAS)

**Privacy Act and Paperwork Reduction Act Notice**

Our authority for requesting information with this survey is 5 U.S.C. § 301, and 26 U.S.C. §§ 7801, 7803, and 7805 and the Paperwork Reduction Act. The information you provide allows the IRS to better understand the role of taxpayer burden in tax administration. This information will also help us to better understand taxpayer needs and identify burden reduction opportunities. Participation in a focus group or in-depth interview is expected to take 1 to 1.5 hours. This includes time to review instructions, complete the screener, and participate in a focus group.

Data collected will be shared with IRS staff, but your responses will be used for research purposes only and will not be used for other non-statistical or non-research purposes such as direct enforcement activities. The information that you provide will be protected as required by law. Providing the information is voluntary.

We may not conduct or sponsor, and you are not required to respond to, a collection of information unless it displays a valid OMB control number. The OMB number for this survey is 1545-2212. Send comments regarding this collection of information, including suggestions for reducing this burden to: IRS, Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.