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Description of document: Bureau of the Fiscal Service (Fiscal Service/BFS) Records regarding unredeemed savings bonds and the Treasury Hunt program, 2021/2017

Requested date: 28-October-2021

Release date: 03-December-2021

Posted date: 03-January-2022

Note: Replace hyperlink provided in release letter for Monthly reporting of savings bonds with this working link:
[Dataset Search | U.S. Treasury Fiscal Data](#)

Source of document: U.S. Department of the Treasury
Bureau of the Fiscal Service (Fiscal Service)
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As a follow-up from your email dated November 8, 2021, regarding request 2022-FSF-00016, please find the responses below.

Item One:

“Records in the program office that describe the number and value of unredeemed savings bonds, and changes in this number over time (trends), the number of savings bonds redeemed each year, and the number of inquiries regarding unredeemed savings bonds, and the description of the program within BFS responsible for managing the unredeemed savings bonds. I would like any recent periodic reporting on the Unredeemed Savings Bonds program such as internal reports to the Director of BFS and/or to the Treasury Department Departmental Offices and/or to the Office of the Secretary. I would like the job description of the person who is in charge of the Unredeemed Savings Bond program.”

- Monthly reporting of savings bonds can be found here: <https://fiscalservice.treasuryecm.gov/alex/dept/rss/Lists/document/All%20Items.aspx>
- Attached to this email is a presentation Treasury gave at the National Association of Unclaimed Property Administrations (NAUPA) webinar in September 2021.
- The Assistant Commissioner for Retail Securities Services has general oversight responsibility for the Retail Securities Services program, which includes activities related to unredeemed savings bonds. The position description for this office is attached.

Item Two:

“Any records regarding or describing the current status of the Treasury Hunt program or its replacement, and any changes to the status of the Treasury Hunt program in recent years, and a description of any replacement for the Treasury Hunt program and what efforts have taken its place.”

- Treasury Hunt is an application for the public to search for matured savings bonds. Information about the status of Treasury Hunt can be found at: <https://treasuryhunt.gov/>.

Item Three:

“Any records describing improvements to the BFS unredeemed treasury bond search capabilities, as indicated by recent changes or proposed changes to federal law, or as indicated by Executive Order 13968. See, for example:

<https://hyperlink.services.treasury.gov/?origin=https://www.presidency.ucsb.edu/documents/executive-order-13968-promoting-redemption-savings-bonds>.”

- The solicitation can be found here: <https://sam.gov/opp/521ec355147741369cdf089b5e75caed/view>. The procurement action is ongoing.

Item Four:

“Any records describing proposals to add unredeemed savings bonds to state unclaimed property databases, or adding links from state unclaimed property databases to the Treasury Hunt website, discussions of any concepts about working closer with state unclaimed property offices to reunite unredeemed savings bond owners with their property.”

- The attached NAUPA presentation documents our participation with the states.

MATURED UNREDEEMED DEBT (MUD) UPDATE

U.S. Department of the Treasury
Bureau of the Fiscal Service
September 2021



BUREAU OF THE
Fiscal Service
U.S. DEPARTMENT OF THE TREASURY

Introduction

Thank you for allowing us to participate in this webinar and an additional opportunity to bring more awareness about MUD. We have made a lot of progress since we last spoke and are eager to share what we've done and plan to accomplish in the future.

Since we began our partnership in January 2020, we have learned a great deal about the important work the states are doing. We appreciated the invitation to the NAST Treasury Management Training Symposium the last two years and look forward to attending next year.

We are excited for our partnership to continue to grow and the opportunity to further collaborate on the most important task – getting bond proceeds back to the rightful owners.



MUD Background

The Department of the Treasury began issuing U.S. Savings Bonds in 1935. Savings bonds that have reached full maturity and stopped earning interest (typically after 30 years) are considered Matured Unredeemed Debt (MUD).

By law, savings bonds never expire and there is no deadline for owners to redeem their bonds; therefore, these bonds remain as an obligation of the United States.

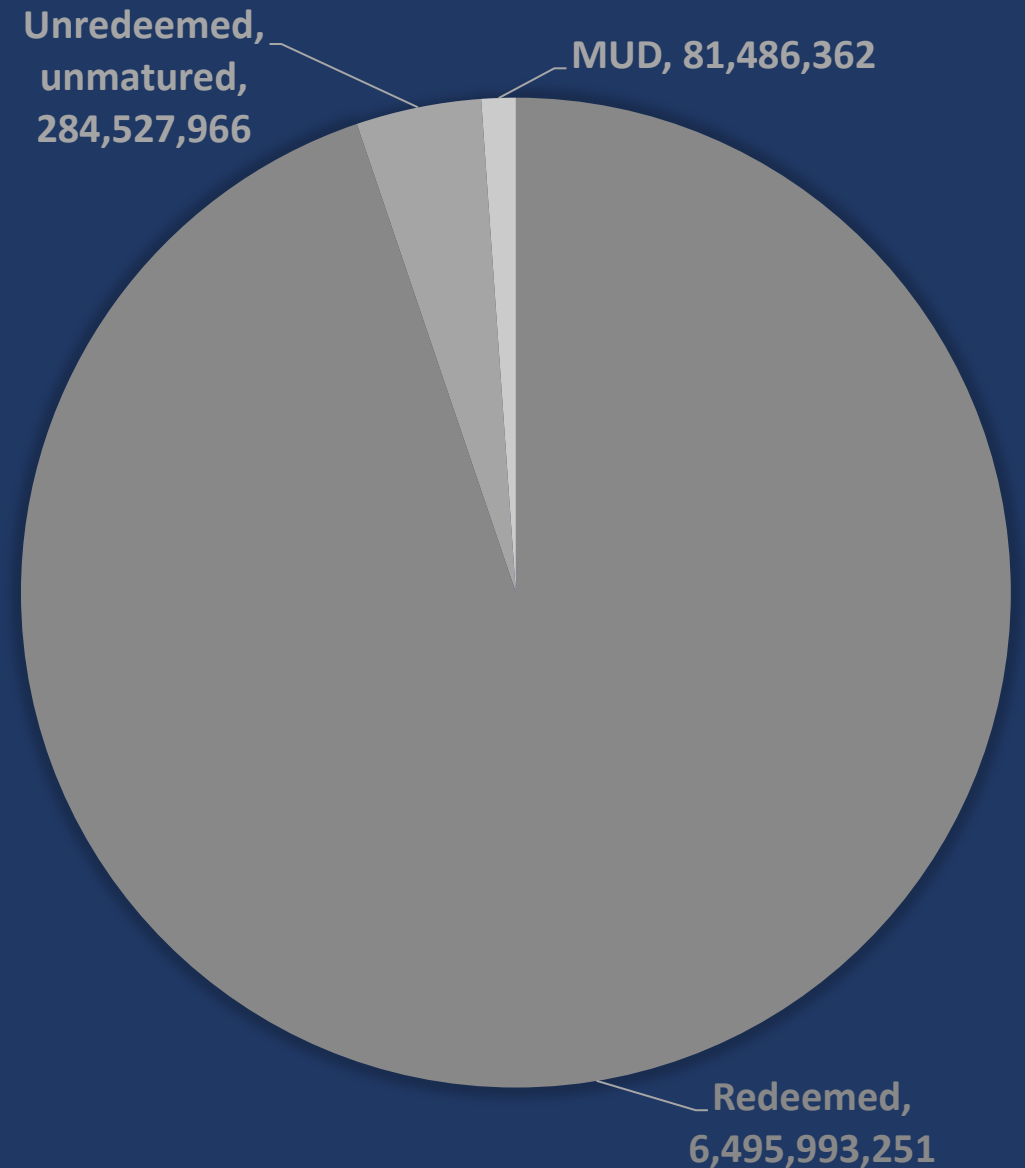
On December 18, 2020, the White House issued Executive Order 13968, “Promoting Redemption of Savings Bonds,” to continue to promote the redemption of matured savings bonds. Per the Executive Order, Treasury published a report on June 17, 2021, with an update on the MUD Initiative.



MUD Statistics

As of July 31, 2021, MUD represents approximately **81.5 million** savings bonds, totaling **\$29.7 billion** dollars. This amount grows monthly as additional savings bonds mature.

Of the approximately **7 billion** securities issued in paper form, **81 million** pieces are considered MUD, representing approximately **1%** of the total pieces.

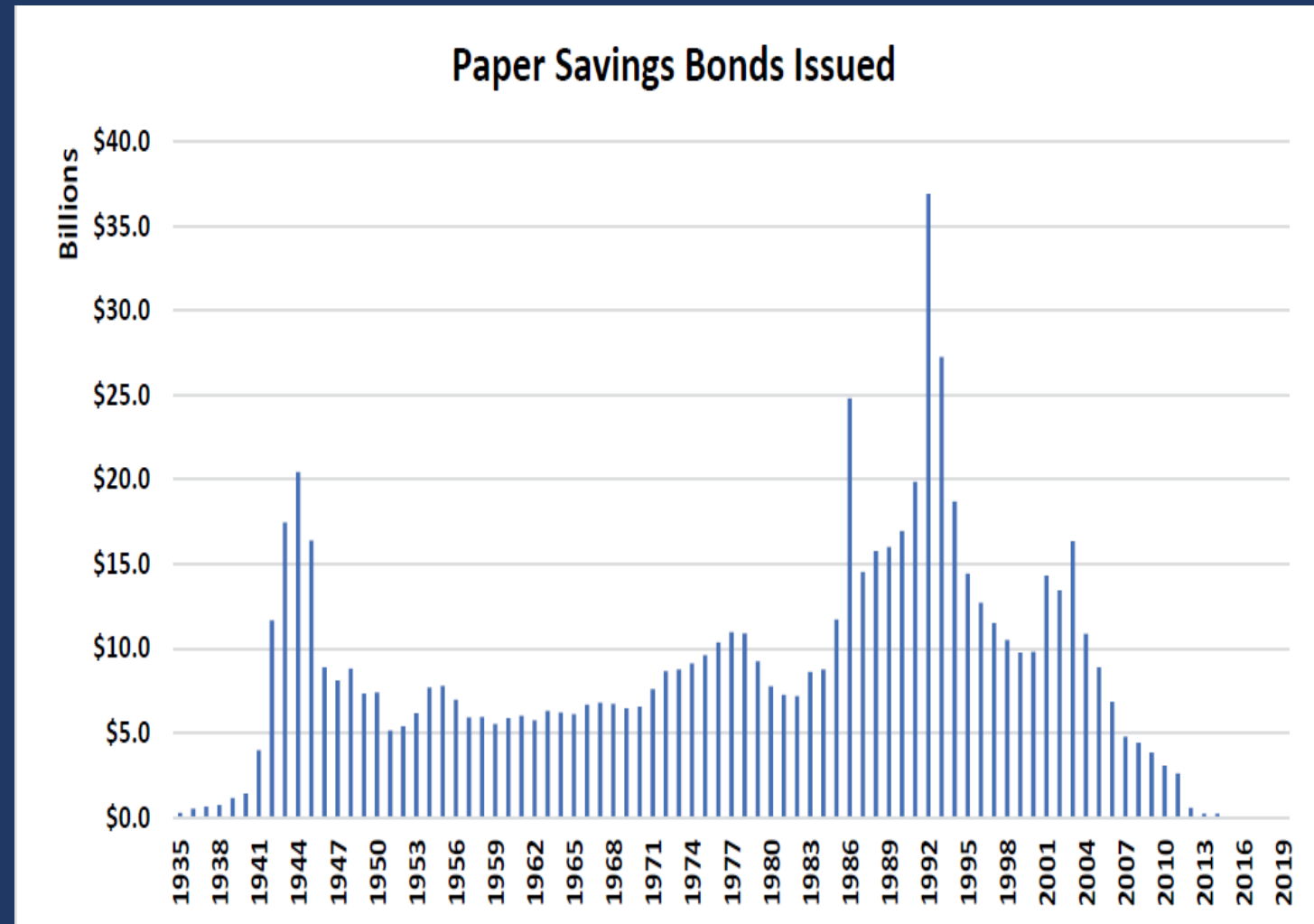


MUD Growth

A surge in the issuance of savings bonds occurred when interest rates and inflation were relatively high during the mid-1980s through the early 1990s.

This has caused MUD to continue to grow rapidly. Between 2018 to 2020, MUD increased by approximately \$3 billion.

Despite all the efforts we are incorporating to locate bondholders, the amount of MUD will continue to grow monthly as additional bonds mature but are not redeemed.



Partnership with States

We appreciate you encouraging states to remind the public of matured savings bonds by sharing the Treasury Hunt link on individual unclaimed property sites.

To date, nine have a direct link to Treasury Hunt on their site and 27 have a link to MissingMoney.com (which provides a link to Treasury Hunt).

We need your help to keep spreading the word! This is an easy way to help citizens redeem their bonds.

With respect to population having an affect on results, these are the top five states by total matches:

New York – 7,529

California – 6,330

Pennsylvania – 6,099

Florida – 5,111

Illinois – 4,512



MUD Focus Areas

- **Partnerships with States:** Partner with the states to learn best practices, promote Treasury Hunt and boost redemptions.
- **Treasury Hunt:** Provide an online search tool for the public to identify potential MUD.
- **Records Modernization:** Extract owner data from existing microfilm and index images for a searchable database (the digitization effort funded by Congress). Treasury awarded contracts to three vendors in May 2021.
- **Data Analysis:** Perform data matching of MUD records against other databases to better identify bond owners.
- **Customer Research:** Understand why customers do not redeem their bonds at maturity to develop outreach efforts and/or process improvements.
- **Communications & Marketing:** Raise awareness with various audiences and work with other agencies e.g., Veterans Affairs (VA) to reunite bond owners with their proceeds.
- **Longer Term Initiatives:** Ease bond redemption with innovative methods such as automating the process.



Treasury Hunt

In **December 2019**, Treasury Hunt, an online tool to search for open bonds and/or missing interest payments was launched.

As of August 23, 2021:

- **22,482** individual SSNs have redeemed **201,835** bonds worth **\$107.7 million**
- Total searches: **929,550**
- Total potential matches: **107,151**

In **April 2020**, Treasury Hunt began capturing the searcher's state of residence.

As of August 23, 2021:

- **783,330** searches have resulted in **87,036** potential matches returned from all 50 states, the District of Columbia, Armed Forces Europe and Pacific and seven territories.



Bond Records Landscape

Locating MUD bond owners is challenging for several reasons. The bond records, which are housed on microfilm, are of poor quality and are not easily accessible or searchable. The records are issue stubs, not the actual bond images. Additionally, interpreting the data points, is difficult due to various styles of inscriptions and fonts on the face the bonds. The images on the right illustrate how the records vary in presentation and readability.

Savings bonds issued prior to 1974 did not require a Social Security Number (SSN); therefore, unique identifying information is not available.

Other impediments include

- deceased bond owners
- difficulty locating heirs
- bonds purchased as gifts
- incomplete addresses

Even if bond owners are located, many are hesitant to redeem their bonds upon maturity (or thereafter) due to tax implications.

NUMERICAL RECORD—UNITED STATES SAVINGS BONDS

CONTROL SERIAL NO. 52,001,000 SERIES E DENOMINATION \$25

BOND NUMBER	BOND NUMBER	BOND NUMBER	BOND NUMBER
000	100	200	300
000 2 10 52	000 2 7 52	000 2 11 52	000 2 15 52
01 0P 43 6231	01 2 3 50	01 2 11 50	01 2 15 50
02 00 63 63	02 2 16 48	02 2 22 49	02 2 26 49
03 02 12 47	03 00 1083 65	03 00 163 65	03 02 16 47
04 04 30 47	04 2 10 47	04 00 163 65	04 02 16 47
05 02 16 48	05 00 63 63	05 02 16 48	05 02 16 48
06 02 12 57	06 2 16 48	06 2 7 52	06 2 16 48
07 02 11 59	07 2 6 55	07 2 16 48	07 2 16 48
08 02 2 68	08 2 16 48	08 2 16 48	08 2 16 48
09 0P 42 6231	09 2 13 50	09 2 12 49	09 2 12 49
10 00 19 43	10 2 12 53	10 2 1 53	10 2 1 53
11 02 11 51	11 00 16 43	11 00 16 43	11 00 16 43
12 01 15 50	12 00 2 4 53	12 00 2 4 53	12 00 2 4 53
13 00 1083 65	13 00 16 43	13 00 16 43	13 00 16 43
14 00 932 45	14 00 598 66	14 00 2 18 49	14 00 2 18 49
15 06 427 66	15 00 75 63	15 00 2 18 49	15 00 2 18 49
16 00 2 16 49	16 00 2 16 49	16 00 2 16 49	16 00 2 16 49
17 02 5 55	17 00 181 63	17 00 2 10 58	17 00 2 10 58
18 02 2 16 48	18 00 2 16 48	18 00 2 16 48	18 00 2 16 48
19 02 2 9 66	19 00 96 66	19 00 2 6 53	19 00 2 6 53
20 00 63 63	20 00 2 3 53	20 00 2 3 53	20 00 2 3 53
21 00 966 45	21 00 22 43	21 00 2 22 43	21 00 2 22 43
22 00 967 45	22 00 2 22 47	22 00 2 22 47	22 00 2 22 47
23 00 166 66	23 00 2 1 53	23 00 2 1 53	23 00 2 1 53
24 00 1083 65	24 00 16 43	24 00 16 43	24 00 16 43
25 00 1083 65	25 00 16 43	25 00 16 43	25 00 16 43
26 00 1083 65	26 00 16 43	26 00 16 43	26 00 16 43
27 00 1083 65	27 00 16 43	27 00 16 43	27 00 16 43
28 00 1083 65	28 00 16 43	28 00 16 43	28 00 16 43
29 00 1083 65	29 00 16 43	29 00 16 43	29 00 16 43
30 00 1083 65	30 00 16 43	30 00 16 43	30 00 16 43
31 00 1083 65	31 00 16 43	31 00 16 43	31 00 16 43
32 00 1083 65	32 00 16 43	32 00 16 43	32 00 16 43
33 00 1083 65	33 00 16 43	33 00 16 43	33 00 16 43
34 00 1083 65	34 00 16 43	34 00 16 43	34 00 16 43
35 00 1083 65	35 00 16 43	35 00 16 43	35 00 16 43
36 00 1083 65	36 00 16 43	36 00 16 43	36 00 16 43
37 00 1083 65	37 00 16 43	37 00 16 43	37 00 16 43
38 00 1083 65	38 00 16 43	38 00 16 43	38 00 16 43
39 00 1083 65	39 00 16 43	39 00 16 43	39 00 16 43
40 00 1083 65	40 00 16 43	40 00 16 43	40 00 16 43
41 00 1083 65	41 00 16 43	41 00 16 43	41 00 16 43
42 00 1083 65	42 00 16 43	42 00 16 43	42 00 16 43
43 00 1083 65	43 00 16 43	43 00 16 43	43 00 16 43
44 00 1083 65	44 00 16 43	44 00 16 43	44 00 16 43
45 00 1083 65	45 00 16 43	45 00 16 43	45 00 16 43
46 00 1083 65	46 00 16 43	46 00 16 43	46 00 16 43
47 00 1083 65	47 00 16 43	47 00 16 43	47 00 16 43
48 00 1083 65	48 00 16 43	48 00 16 43	48 00 16 43
49 00 1083 65	49 00 16 43	49 00 16 43	49 00 16 43
50 00 1083 65	50 00 16 43	50 00 16 43	50 00 16 43

ORIGINAL REGISTRATION STUB

UNITED STATES SAVINGS BOND

Q 6 054 816 109 E

THE BOND IDENTIFIED HEREON HAS THIS DAY BEEN ISSUED WITH THE NAME AND ADDRESS OF THE OWNER AND THE ISSUE DATE INScribed THEREON AT THE TIME OF ISSUE, AUTHENTICATED BY OFFICIAL DATING STAMP, AS FOLLOWS:

ISSUE DATE

Illegible text for name and address. Possibly SSN.

Illegible text for 2nd name.

Do NOT fold, spindle or mutilate.

Records Modernization

Due to the state of our bond records, we began a digitization effort in December 2019 to modernize the dated microfilm. We began a new, iterative, two-phased approach in early 2021.

During Phase 1, we awarded a contract in May 2021 to three vendors. In July, we shipped a sampling of 5,000 reels to each vendor for the time period of 1974-1993, allowing them four months to test and perfect their digitization process, which will be completed in November.

Next, each vendor will have two months of production time from mid-November until mid-January 2022 to digitize their 5,000 reels to prove they can meet our requirements. They will share their results January 19th and we will validate their work through February.

Vendor(s) for Phase 2 will be selected in February 2022. This phase will begin on February 22, 2022 and will consist of digitizing the remaining reels of microfilm. Phase 2 will take 12 months to complete.



Data Analysis

Treasury has compared over 64 million MUD records against various internal systems to identify potential bond owners.

We began using the results to prioritize specific, high value groups of bond owners to develop and conduct outreach. The style, method, and content of our current outreach is targeted on specific populations based on what our data suggests would be the most effective approach for promoting bond redemptions.

Treasury initiated a data matching effort with the VA because many veterans were encouraged to purchase savings bonds during basic training. We compared our records and have identified a significant number of matches and will conduct outreach to veterans soon.



Customer Research

Treasury launched a market research initiative in February 2021 to determine:

- Why individuals do not redeem savings bonds upon maturity
- What would motivate individuals to redeem a bond
- What are the most impactful process improvements that would increase MUD redemption.

The results show that nearly half of customers are unaware they have MUD bonds or have simply forgotten about them.

A large majority of customers who know they have matured bonds do not plan to redeem them now because they do not need the money, do not want to pay taxes on the interest, or for other reasons.



Customer Research, cont.

We received the research results in June 2021 and have been analyzing them to develop data-driven techniques to improve the redemption process and the customer experience.

In July, we updated the TreasuryDirect.gov website with language about savings bonds that is easier to understand. A re-design of the entire website is currently underway, and we are confident the additional changes will improve the customer experience.

In August, we made the redemption process easier by allowing customers to redeem bonds valued at \$1,000 or less with just a valid ID, instead of requiring a certified signature.



In August 2021, we began mass mailings to notify customers of their MUD bonds. This includes TreasuryDirect customers who also have over \$1,000 in MUD. These mailings will continue in batches of 10,000 letters for the next four months and we will track the success rate from this effort.

We will soon be mailing outreach letters to customers who have bonds that are getting ready to mature to serve as a reminder to redeem them.

We also plan to reach out to customers who have active federal debts and MUD bonds.

Treasury will continue to bring awareness to MUD by establishing a larger presence on social media and working with specific organizations to encourage customers to redeem their bonds.



Longer Term Initiatives

As more knowledge is obtained from other initiatives, Treasury will focus on improving the customer experience, particularly as it relates to the ease of redeeming savings bonds.

Other options for expediting bond redemptions are also being explored, such as using mobile capture technology for physical bonds.

We will also improve the process for filing claims for lost or stolen bonds, such as developing an application or online tool to automate and expedite the process.

Currently, we are exploring improvements to Treasury Hunt, such as providing customers with more information about their bonds in the search results.





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POSITION DESCRIPTION

ASSISTANT COMMISSIONER (RSS), ES-0340-00

SETID	FS001	JOB CODE	16777P	DATE	12/01/2017	OPM CERT #			
PAY PLAN	ES	SERIES	0340	GRADE	00	PAY BASIS	Per Annum	FUNC CLASS	NA
WORK TITLE	Assistant Commissioner (Retail Securities Services)								
SPVY LEVEL	Supv/Mgr	POSITION SENSITIVITY	3C CS - Cm	LEO POSITION		MEDICAL CHECK REQ.	No	BUS CODE	8888
FLSA	Exempt	PATCOB	Admin	EXECUTIVE DISCLOSURE	No	EMPL/FIN INTEREST	No	FUND SOURCE	Approp Fnd
CYBER SEC CODE	000000000	DESCR							
CLASSIFIER									
CLASS STANDARD									
DATE CLASSIFIED		08/24/2017							

MAJOR DUTIES

ASSISTANT COMMISSIONER (RETAIL SECURITIES SERVICES)

ES-0340-00

PD# 16777P

INTRODUCTION

As Assistant Commissioner (Retail Securities Services), the incumbent is responsible for establishing policy and providing executive direction, guidance, leadership, and program oversight for all aspects of Retail Securities Services (RSS) in offering Americans simple and accessible Treasury securities to build savings and help enable financial confidence in support of the Bureau of the Fiscal Service's (Fiscal Service) mission of promoting the financial integrity and operational efficiency of the federal government through exceptional accounting, financing, collections, payments, and shared services.

The Assistant Commissioner is responsible and has full authority for the administration, direction, and program oversight of the varied and complex retail securities operations and function of RSS. This includes all activities regarding the issuing and retiring of securities, maintaining related records, and servicing wholesale and retail customers who invest in Treasury securities.

MAJOR DUTIES AND RESPONSIBILITIES

Specific duties of the incumbent include, but are not limited to, the following:

Serves as principal advisor and consultant to the Commissioner, Deputy Commissioners, and all levels of Treasury management on Fiscal Service's retail securities policies and practices. Establishes and implements the Retail vision and strategic direction within the Fiscal Service.

Maintains a continuing liaison with key officials within the Department of the Treasury, the Federal Reserve System, other federal agencies, and financial institutions, in an effort to coordinate all of the various activities and improve upon the efficiency and effectiveness of the retail securities programs. Participates actively in meetings and conferences with these key officials in order to provide authoritative information, present and defend the views of Fiscal Service, and to learn of and subsequently plan ways in which to accomplish future program goals.

Provides executive leadership and direction for the activities of RSS, including planning, organizing, coordinating, and evaluating its programs and functions.

Directs, through top operating officials at the director level, a staff of professional, analytical, and clerical employees who carry out the activities and operations of RSS. Guides RSS personnel toward the achievement of program goals and objectives. Determines resource requirements for RSS and defines the roles and authorities assigned to RSS organizations and key positions.

ASSISTANT COMMISSIONER (RSS), ES-0340-00

Determines the optimal organizational structure and utilization of resources to accomplish mission and objectives in an efficient, economical, and effective manner. Determines operating policies and best practices of RSS in view of budgetary, public relations, and political concerns.

Serves as a senior advisor to the Commissioner and Deputy Commissioners, providing expert executive level advice, guidance, and support on critical matters pertaining to policies, priorities, and program direction of the Fiscal Service and to its structure, organization, and operation.

Serves as a key member of the Fiscal Service's senior management team. Serves on executive committees such as the Executive Board. As such, the incumbent actively participates in the formulation and execution of major Fiscal Service policies and plans.

Formulates short and long-range plans to ensure the continuing effectiveness of the Fiscal Service's retail securities programs. Is ultimately responsible for assuring that RSS plans and objectives are designed to further the goals set forth in the Fiscal Service's tactical, strategic, and operational plans.

Represents the Fiscal Service to officials at the Department, other Treasury bureaus, Federal Reserve Banks, and other Federal agencies regarding issues and matters of mutual concern. Maintains continuing liaison with key officials in these agencies for the purpose of interpreting and advising on new Fiscal Service policies and plans and for securing cooperation regarding Fiscal Service initiatives.

FACTOR 1 - KNOWLEDGE REQUIRED BY THE POSITION

Proven executive skills in applying knowledge of management theories, concepts, practices, and techniques to lead and direct highly complex financial operations, manage and direct the combined efforts of subordinate managers and supervisors toward timely accomplishment of program objectives, delegate authority appropriately, plan and evaluate internal operating policies and procedures and assess the impact of external influences, monitor the efficient and effective use of resources, balance managerial and technical considerations in the decision-making process, and resolve complex managerial and administrative problems arising from all aspects of retail securities operations.

Knowledge of the technical aspects of debt financing and of related Fiscal Service and Departmental policies and precedents in order to effectively direct, assess, and improve upon the operation of the retail securities program.

Knowledge of the programs and functions of the Fiscal Service as they relate to the retail securities operations and activities provided in support of the Fiscal Service's mission.

Ability to work under inflexible deadlines and to deal with information in strictest confidence because of the impact improper disclosure could have on the international and national money markets.

Ongoing understanding of the social, political, and economic forces that influence Treasury's financial decisions.

Ability to manage and direct the work of subordinates, toward the timely and effective accomplishment of the mission.

Ability to deal effectively and tactfully with top-level Treasury and other Federal agency officials.

Skill in effective oral and written communication to justify, defend, negotiate or settle highly complex and significant issues with officials from varied backgrounds with varying interests or objectives.

FACTOR 2 - SUPERVISORY CONTROLS

The incumbent reports to the Deputy Commissioner, Financial Services and Operations, who provides only broad policy guidance and direction. This guidance is normally in the form of general discussions on current and projected issues. Within the general framework of covering statutes and regulatory policies, the Assistant Commissioner is expected to independently plan and direct the activities of the RSS on a short and long-term basis, resolve management problems that arise on his her own initiative, and decide upon appropriate courses of action even during the absence of the Deputy Commissioner. Typically, the Assistant Commissioner confers with the Commissioner, Deputy Commissioners, and other senior managers only in instances where issues are far-reaching or extremely controversial. The incumbent's performance is evaluated in terms of the overall results achieved.

FACTOR 3 - GUIDELINES

Guidelines applicable to the work are basic legislation and broadly stated agency policies. Significant judgment and ingenuity must be exercised in determining how such guidance will generally be applied within the organization and how it will specifically be adapted and applied to unprecedented and unique circumstances that arise during the accomplishment of RSS's mission. The incumbent is also responsible for determining the need for and directing the development of new and or revised methods, procedures, and policies that address significant programs and issues and controversial subjects.

FACTOR 4 - COMPLEXITY

As a key member of Fiscal Service's senior management team, the incumbent provides direction and coordination for the Fiscal Service's retail securities operations. The nature of the work requires a keen awareness of financial developments to assess their impact on the regulatory and technical phases of the retail securities activities. The work requires that the incumbent strike a balance between highly complex technical and managerial considerations when formulating policies, solving problems, devising contingency plans to deal with unforeseen problems, and developing forecasts and long-range plans. The duties and responsibilities of the Assistant Commissioner are further complicated by the need to consider the economic, social, political, and financial forces that affect and influence the Fiscal Service's mission and select a course of action based on established precedent and an in-depth knowledge of the current and future needs of the organization.

FACTOR 5 - SCOPE AND EFFECT

The Assistant Commissioner is responsible for and directly affects the accomplishment of the Fiscal Service's retail securities operations, which enable the primary mission of the organization and impact Treasury's ability to manage the U.S. Government's finances effectively. Further, the efficient and effective management of Fiscal Service's retail securities operations contributes directly to the perception of the Fiscal Service as a leader in government-wide financial management efforts. Because Fiscal Service programs touch millions of individual citizens, taxpayers, institutional investors, other customers, and virtually every Federal agency, and state and local governments across the nation, the effect of Fiscal Service program performance and customer service contributes to overall public perception of the value and competence of the U.S. Government.

FACTOR 6 - PERSONAL CONTACTS

Contacts include all levels of Fiscal Service employees; other senior-level officials in Treasury, the Federal Reserve System, and other Federal agencies; contractors; and heads or other representatives of private sector organizations.

FACTOR 7 - PURPOSE OF CONTACTS

ASSISTANT COMMISSIONER (RSS), ES-0340-00

The purposes of the contacts vary widely and frequently. Purposes include providing guidance and direction to RSS employees, explaining and advocating Fiscal Service programs, negotiating deliverables and schedules, defending actions, and fostering strong collaborative relationships with key external customers. The incumbent is a senior representative of the Fiscal Service in external meetings and also functions as a representative for Treasury.

FACTOR 8 - PHYSICAL DEMANDS

The work is sedentary.

FACTOR 9 - WORK ENVIRONMENT

Work is performed in an office setting. This position may involve frequent travel to meet with officials from Treasury, Federal Reserve Banks, and other officials in various geographical locations.

JOB COMPETENCIES (The full range of competencies for the occupational series is provided for information and development purposes; not every competency displayed is required at the individual position level.)

EVALUATION STATEMENT