



Retirement Plan Evaluation Survey

Please rate each of the following aspects of your plan from 1-5 in importance to you as a plan sponsor, with 1 being the most important and 5 being the least important. Also, in the same way, please rate how you feel your current plan addresses these issues, with 1 being extremely well and 5 being not at all.

Yourself	Current Plan	
___	___	Investment performance
___	___	Investment strategy/philosophy
___	___	Range of investment options
___	___	Brand name of investment options
___	___	Fiduciary Responsibility/Liability
___	___	Costs to participants (fund expenses and any other asset based fees)
___	___	Costs to Plan Sponsor
___	___	Ability for highly compensated employees to defer as much as possible
___	___	Flexibility in the plan document to direct profit sharing or matching contributions to specific employees
___	___	Employee appreciation of the plan (do participants value the plan as part of their compensation)
___	___	Employee education
___	___	Participation rate
___	___	Enrollment materials
___	___	Website features
___	___	Participant advice
___	___	Ease of administration
___	___	Client service
___	___	Participant Statements