

# Retirement Plan Analysis

## Areas of Importance

Plan Name \_\_\_\_\_

*Costs/Fees – Investment Options – Fiduciary Process – Employee Education – Plan Design & Administration*

- Investment Options
- Cost/Fees
- Fiduciary Responsibility
- Employee Education
- Design/Administration

*For a customized Retirement Plan Analysis that best meets your company's objectives, to the left please rank the 5 areas 1-5 based on the level of importance to YOUR COMPANY and provide the three easily accessible pieces outlined below*

**3 Things We Need**  
*408(b)(2) & 404(a)(5) Fee Disclosure Documents  
Average Hard Dollar Costs for 1 year*

Please let us know any areas of pain you may be or have been experiencing with your current retirement plan offering:

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