

Employee Retirement Survey

We want to offer a retirement plan that helps you reach your goals. Please take a moment to let us know how we’re doing and where we can improve.

First Name:

Last Name:

Email:

Phone:

1. On a scale of 1-10, how satisfied are you with:	Very Dissatisfied					Very Satisfied				
	1	2	3	4	5	6	7	8	9	10
a. Your company retirement plan	1	2	3	4	5	6	7	8	9	10
b. The 401(k) plan website	1	2	3	4	5	6	7	8	9	10
c. The amount of interaction you have with a retirement plan advisor	1	2	3	4	5	6	7	8	9	10
d. The investments available	1	2	3	4	5	6	7	8	9	10
e. The retirement plan education and support provided	1	2	3	4	5	6	7	8	9	10
f. Your financial preparedness for retirement	1	2	3	4	5	6	7	8	9	10

2. If you have a question about your retirement plan, do you know who to contact?

Yes

No

3. How often would you like to review your retirement plan with an advisor?

- a. Twice a year
- b. Annually
- c. Every other year
- d. Every 3+ years

4. Anything else you’d like us to know?