

# Questions for Plan Sponsors

## Plan Design

- *Does your Plan still meet your Company's objectives?*
- *Does your current Plan allow you to save the full dollar amount that you would like to?*
- *Did you know that many Plan Designs may allow for you to save more than the standard limits?*

## Plan Operation

- *Are you dealing with your TPA long distance or face to face?*
- *Is it easy for your HR to communicate with your TPA?*
- *Do you fully understand exactly what your TPA does for you?*

## Annual Review

- *Have you looked for retirement plan alternatives?*
- *Has the plan performed the required investment review? (performance & fees)*
- *Is your Investment Policy Agreement up to date and adhered to?*

