

Qualified Plan Sales Tips

Does your company offer a retirement plan?

YES

- ❑ Which 401(k) provider are you currently using?
- ❑ Are you satisfied with the plan provider?
- ❑ Are their fees competitive?
- ❑ Are you meeting your objectives? (i.e., receiving the max. benefit)?
- ❑ Do you have a Corporate Trustee to relieve fiduciary responsibility?
- ❑ Are participants able to invest with no-loads & no transaction fees?
- ❑ How many participants/employees are in the plan?
- ❑ Is the plan's Fund Menu diversified among many fund families?
- ❑ Are participant accounts valued daily?
- ❑ Do you have one administrative contact, or is it luck-of-the-draw in terms of who you'll speak with?
- ❑ What is the approximate asset level in the plan?

Would you like our T.P.A. partner to present you with a quote?

NO

- ❑ Are you ready to consider a 401(k) and its benefits?
- ❑ Have you looked at any other providers?
- ❑ What are the top 3 wants/needs when shopping for a 401(k) plan?

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