
If you currently do not offer a retirement plan benefit to your employees, is there anything that would need to occur for you to consider offering such an employee benefit? Please Explain.

- Yes
- Maybe
- Not interested

If you currently do not have a retirement plan benefit for your employees, would you be interested in exploring what it would take to get one started?

- Other: Please describe.
 - Much Lower Fees
 - More Investment Diversity
 - Promise/Delivery of Better Customer Service
 - Better Returns on Investments
- If at all, what might prompt you to consider reviewing and considering a change in your current plan provider/administrator?





RETIREMENT PLAN BENEFIT PROGRAM

MEMBERSHIP SUREY

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If YES, what is the name of your plan provider/administrator?

If YES, what fees are you currently paying for administration and recordkeeping?

Base Fee: \$ _____ per year
 Per Participant Fee: \$ _____ per year
 Asset Fee: \$ _____ per year
 Termination Fee (If Applicable): \$ _____

Other Fees (If Any):
 _____ : \$ _____
 _____ : \$ _____

If YES, what is the nature of the investment options offered to your plan's participants through your plan and who are they offered through?

Our Investment Options Are Offered Through:
(A combination of more than one of the following is possible)

- A Bank: Yes No
- A Securities Broker: Yes No
- A Mutual Fund Company: Yes No
- An Insurance Company: Yes No
- Other: _____

Investment Options:

1. Mutual Funds: Yes _____ No _____

If Yes, from what fund families are the funds that you offer?

DC Assoc. of CPS
RETIREMENT PLAN BENEFIT PROGRAM
MEMBERSHIP SURVEY

DC Association of Chartered Public Schools Member School Name: _____

Preparer Name & Title: _____

Preparer Phone Number: _____ Email: _____

Does your organization currently offer a retirement plan employee benefit?

[] YES [] No

If YES, what type of retirement plan do you offer your employees?

[] 401k Plan with an employer match

[] 401k Plan without an employer match

[] Profit Sharing Plan

[] Other: _____

If YES, how many of your employees are participating in your organization's retirement plan?

_____ # of employees participating in plan

_____ # of employees

If YES, how large is your plan?

_____ Total Assets in Plan: \$