



401(k) Sales Champion Workshop

~ INITIAL PROFILING QUESTIONS ~

1. How long has the company 401(k) plan been in place?
2. Why did the company establish the 401(k) plan; what goals are you trying to accomplish with the 401(k) plan (attraction, retention of employees)?
3. Who decides who the company 401(k) program provider will be?
4. Who is currently providing services for the company 401(k) plan?
5. What problems with your current program provider(s) do you want to solve? Better service? Lower cost? Better investments? Better support for employees?
6. Is it time to upgrade your company 401(k) plan?
7. What improvements, features would you want for your upgraded 401(k) plan?
8. Will you conduct a review of your 401(k) plan this year?
9. Are there any circumstances, like current business relationships or family ties that cause you to favor one program provider over another? (If applicable) Would all other decision makers answer the same?

ERISA Services, Inc.

Administration & Design Services for Pension, 401(k) and Profit Sharing Plans

1-865-966-1225 www.erisaservices.com