

THE QUALIFIED RETIREMENT PLAN SCORECARD™

Improving Business and Quality of Life



Is Your Retirement Plan Working
As Well As It Could Be?

"That which is measured improves.
That which is measured and
reported improves exponentially."

-Karl Pearson



HOCHHEISER, DEUTSCH
& Company Inc

Helping to Secure Your Lifestyle and Your Legacy

Take the Qualified Retirement Plan Scorecard
and Find Out in 90 Seconds!

THE QUALIFIED RETIREMENT PLAN SCORECARD

Take 90 Seconds To See How Your Plan Stacks Up!

Key Components	Evaluating Your Plan	Rate Your Plan 1 (Least) – 5 (Best)	What Does Your Score Mean?
1 Design	The current retirement plan design is meeting all of my objectives. I'm maximizing my tax savings, building personal funds for my own retirement as well as providing incentive for my key employees.		<p>GREATER THAN 26</p> <p>You're in Good Shape! Be aware of new regulatory changes by the Department of Labor towards fiduciary rules.</p> <p>18 - 26</p> <p>Your plan will likely benefit from a second opinion. Improvements could increase the plan's value for you and your employees, while also offering better fiduciary protection.</p> <p>LESS THAN 18</p> <p>A complete plan review is critical from a fiduciary, compliance and design standpoint. A complete plan overhaul should be considered.</p> <p>All Progress Begins With A Conversation.</p> <p>info@hdci.biz</p> <p>516.677.6208 - www.hdci.biz</p> <p> HOCHHEISER, DEUTSCH & Company Inc Helping to Secure Your Lifestyle and Your Legacy</p>
2 Fees & Fiduciary Protection	Our current retirement plan is cost efficient and provides a high level of fiduciary protection for myself and the company.		
3 Education	Through regular on-site meetings, my employees are well educated on how the plan works and available investment options.		
4 Performance	An annual performance review is always performed. The investments in the plan are modified as needed and the plan has met targeted performance standards.		
5 Service	Administratively, the plan is easy to work with and we get excellent service from all of our current providers.		
6 Overall Satisfaction	I'm entirely satisfied with all aspects of our current qualified retirement plan.		
Name: _____ Date: _____		Total Score _____	