


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>Email info@hdcibiz to schedule a complimentary plan review.</p> <p> HOCHHEISER, DEUTSCH & Company Inc <small>LONG ISLAND</small> 250 Crossways Park Drive, Woodbury, NY 11797 <small>NEW YORK CITY</small> 355 Lexington Avenue, 9th. Floor, New York, NY 10017 t. 516.677.6208 f. 516.677.6886 www.hdcibiz</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	