





**1. Do you feel that you have the information and resources you need to determine if and when you will be financially able to retire?**

		Response Percent	Response Count
Yes		87.5%	28
No		12.5%	4
answered question			32
skipped question			0

**2. Do you feel that you have the information and resources you need to make informed saving, investing, and planning decisions in order to have an adequate amount of income in retirement?**

		Response Percent	Response Count
Yes		90.3%	28
No		9.7%	3
answered question			31
skipped question			1

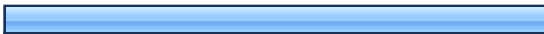



**3. For each of the factors below, please indicate the level of importance as it relates to your DC retirement savings plan at this time for you as a participant.**

	<b>Very important</b>	<b>Somewhat important</b>	<b>Slightly important</b>	<b>Not at all important</b>	<b>Rating Count</b>
Investment performance	<b>75.0% (24)</b>	18.8% (6)	6.3% (2)	0.0% (0)	32
Helping me understand how to invest my account	<b>65.6% (21)</b>	12.5% (4)	15.6% (5)	6.3% (2)	32
Helping me understand how much to save for retirement	<b>58.1% (18)</b>	22.6% (7)	6.5% (2)	12.9% (4)	31
Helping me plan for retirement by estimating retirement income	<b>53.1% (17)</b>	21.9% (7)	18.8% (6)	6.3% (2)	32
Fees	<b>53.1% (17)</b>	34.4% (11)	12.5% (4)	0.0% (0)	32
Overall service	<b>64.5% (20)</b>	22.6% (7)	9.7% (3)	3.2% (1)	31
<b>answered question</b>					<b>32</b>
<b>skipped question</b>					<b>0</b>

**4. Are there any additional factors that are important as you near retirement?**

	<b>Response Count</b>
	12
<b>answered question</b>	<b>12</b>
<b>skipped question</b>	<b>20</b>

**5. After separation of service, how likely are you to keep your DC retirement savings plan assets within your current plan?**

		Response Percent	Response Count
Very likely		81.3%	26
Somewhat likely		12.5%	4
Not likely		3.1%	1
Don't know or don't understand advantages/disadvantages		3.1%	1
<b>answered question</b>			<b>32</b>
<b>skipped question</b>			<b>0</b>

**6. When making your decision regarding what you will do with your 457 assets at retirement, how important is each factor below?**

	Very important	Somewhat important	Slightly important	Not at all important	Rating Count
Selection of investment options	77.4% (24)	22.6% (7)	0.0% (0)	0.0% (0)	31
Access to planning, investment advice and education related to retirement income or spend down	41.9% (13)	41.9% (13)	9.7% (3)	6.5% (2)	31
Personalized attention	38.7% (12)	29.0% (9)	16.1% (5)	16.1% (5)	31
The opportunity to consolidate accounts	38.7% (12)	32.3% (10)	9.7% (3)	19.4% (6)	31
Fees	54.8% (17)	32.3% (10)	12.9% (4)	0.0% (0)	31
<b>answered question</b>					<b>31</b>
<b>skipped question</b>					<b>1</b>

**7. Are there any additional factors that will be important in your decision regarding your retirement savings plans?**

**Response  
Count**

8

**answered question**

**8**

**skipped question**

**24**

**Q4. Are there any additional factors that are important as you near retirement?**

1	Rapidly increasing cost of health care	May 14, 2013 3:01 PM
2	No hassle access to TPA for information.	May 14, 2013 2:36 PM
3	None	May 14, 2013 10:13 AM
4	Protecting my investments from sharp losses from market volatility	May 10, 2013 8:52 AM
5	Funding ratio of DB plan - (DB plans will provide adequate income during retirement)	May 8, 2013 2:29 PM
6	Choosing funds with steady level pf performance is more important to me than chasing funds with highest earnings.	May 8, 2013 2:07 PM
7	How taxes and other outside issues affect retirement planning.	May 8, 2013 1:53 PM
8	Legislation	May 8, 2013 11:15 AM
9	Medical coverage!!!	May 8, 2013 11:12 AM
10	There doesn't seem to be education on how to convert savings to an income stream - a few investment options but no "strategy" if the investment options are unattractive or inappropriate	May 8, 2013 10:51 AM
11	Understanding social security, Medicaid, etc.	May 8, 2013 10:44 AM
12	None that I can think of right now.	May 8, 2013 10:20 AM

**Q7. Are there any additional factors that will be important in your decision regarding your retirement savings plans?**

1	No	May 14, 2013 3:01 PM
2	Investment options' continued resilience in the event of market downturns.	May 14, 2013 2:36 PM
3	income taxes and pension/social security income	May 14, 2013 10:15 AM
4	None.	May 14, 2013 10:13 AM
5	Accurately determining my financial needs in retirement and how to address changing circumstances in retirement.	May 10, 2013 8:52 AM
6	Not typical respondee as I hold a CFP certification	May 8, 2013 2:29 PM
7	Level of trust in existing provider.	May 8, 2013 11:12 AM
8	None that I can think of right now.	May 8, 2013 10:20 AM