TriStar Pension Consulting

8 Questions to Ask Clients Currently Sponsoring a Retirement Plan

1. What is your primary motivation for having a retirement plan?
2. How would you describe the average contribution level in your plan?
3. What criteria did you use to select the target date fund series for your plan?
4. Have you ever been concerned that your plan could be a liability?
5. Do you think income tax rates could be higher in the future?
6. What has been your experience with the new fee disclosure?
7. On a scale of 1 to 10, how would you rate the level of service your plan receives?
8. If you could change one thing about your plan, what would it be?

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