



PATHWAY PARTNERS
WEALTH ADVISORS

401(k) Benchmarking Checklist

HOW WELL DO YOU KNOW YOUR PLAN?

- | | | | |
|----|---|------------------------------|-----------------------------------|
| 1 | Do you know your total plan cost (all fees)? | ☐ Yes | ☐ Not Sure |
| 2 | Are your fees competitive with similar plans? | ☐ Yes | ☐ Not Sure |
| 3 | Do you understand the services you're receiving? | ☐ Yes | ☐ Not Sure |
| 4 | Is your plan design (match, eligibility, vesting) competitive? | ☐ Yes | ☐ Not Sure |
| 5 | Is employee participation and contribution high? | ☐ Yes | ☐ Not Sure |
| 6 | Do you offer automatic enrollment and/or escalation? | ☐ Yes | ☐ Not Sure |
| 7 | Is your investment lineup diversified and appropriate? | ☐ Yes | ☐ Not Sure |
| 8 | Are investment options competitively priced? | ☐ Yes | ☐ Not Sure |
| 9 | Do employees have access to ongoing planning and support? | ☐ Yes | ☐ Not Sure |
| 10 | Are communications clear and easy to understand? | ☐ Yes | ☐ Not Sure |
| 11 | Do you receive regular plan reviews and fiduciary support? | ☐ Yes | ☐ Not Sure |
| 12 | Are you aware of whether required plan filings are up to date? | ☐ Yes | ☐ Not Sure |
| 13 | Did you benchmark your plan in the last 2 years? | ☐ Yes | ☐ Not Sure |
| 14 | Can you document your reviews? | ☐ Yes | ☐ Not Sure |
| 15 | Are you confident your plan helps attract and retain employees? | ☐ Yes | ☐ Not Sure |



**SCHEDULE A COMPLIMENTARY
401(K) REVIEW TODAY!**



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