

PATHWISE QUALIFIED RETIREMENT PLANNING 10 CHECKPOINTS

- 1. PLAYERS**
- 2. PLAN DESIGN**
- 3. PLAN USAGE**
- 4. FEES**
- 5. INVESTMENTS**
- 6. FIDUCIARY DUTIES**
- 7. COMPLIANCE AND ADMINISTRATION**
- 8. COMMUNICATION**
- 9. EMPLOYEES**
- 10. SERVICES – VALUE ADDED**