

This survey has been designed for employers to assess the effectiveness of their retirement plans among their participants.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Not Sure	Not Applicable
My Employer's Retirement Plan						
I value my employer's retirement plan as an important benefit.						
I am satisfied with my employer's retirement plan features including matching contributions or profit sharing contributions.						
Retirement Readiness Indicators						
I understand my retirement income needs and have calculated my retirement savings goal.						
I have a roadmap for achieving my retirement income needs.						
I am saving enough and investing appropriately to achieve my savings goal.						
I am confident that I will be able to fully retire with a comfortable lifestyle.						
Planning Tools & Educational Resources						
Overall I am satisfied with the planning tools and educational resources offered by the retirement plan.						
The retirement plan's online planning tools and educational resources are helpful and meet my needs.						
The educational meetings and seminars offered have been helpful for me to learn about saving, planning, and making informed decisions about the retirement plan.						
I often use the planning tools and educational resources offered by the plan.						
Plan Services / Account Management						
Overall I am satisfied with the retirement plan's website and customer services.						
The website is easy to navigate and obtain information and/or process my requests.						
The automated telephone system is easy to use, obtain information and process requests.						
The telephone contact center representatives are courteous, professional and provide me with the assistance that I need.						
My retirement plan account statements are timely and accurate.						
Investments						
Overall I am satisfied with the retirement plan's investment options.						
I am satisfied with the variety and number of investments available to meet my needs.						
I am knowledgeable about investments, risk tolerance, and asset allocation principles and prefer to manage my investment options on my own.						
I prefer investment options such as target date funds, life-cycle funds and/or professionally managed portfolios that are tailored to my savings goals, years to retirement, and risk tolerance.						

About Transamerica Center for Retirement Studies®

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