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What to ask the New Investment Providers in the 403(b) Plan

The following questions are ones you might ask to gain a basic knowledge of what each investment provider offers as it pertains to investment products and financial services. This is not intended to be the only basis for making your decision but is designed to assist you in making a choice as to which providers might suit you in obtaining your own financial goals. Please interview as many as is necessary to determine the provider with which you wish to participate. ***Remember, you can change your mind in the future and incur no charges for transferring your investments.***

It is very important that you make a selection of an investment provider <u>now</u> so your long term savings goals are not adversely affected.

If you are not yet participating, ***START NOW!!!***

Questions for Investment Providers:

1. **What are my investment options under your account? Funds? Managed Accounts?**
2. **What is my cost of investing with your company?**
3. **What services do you provide for this cost?**
4. **How often do we sit down to review my investments and my long term goals?**
5. **What financial education tools do you have on your website that I can access?**
6. **What other services can I access on your website? What transactions are available online?**