

Questions re: possible Association Health Plan and 401(k) Plan

1. Do you currently have a 401(k) for your employees?
 - Yes
 - No
2. If "yes" to above, who is your provider?
3. If you don't have a plan currently, would you consider one for the future?
 - Yes
 - No
4. If you have one, what is your current asset size?
 - 0 - \$ 500K
 - \$ 500 K - \$ 1M
 - \$ 1M - \$ 2M
 - \$ 2M - \$ 5M
 - \$ 5M+
5. What is your participant size?
 - 1 - 10
 - 11 - 25
 - 26 - 50
 - 51 - 75
 - 76 - 100
 - 100 +
6. Do you currently perform the day to day operational tasks on your 401(k) plan?
 - Yes
 - No
7. If 'yes' on the above question, do you like being involved in the investment selection process?
 - Yes
 - No
8. How often is 401(k) education performed annually?
 - 1
 - 2
 - 3
 - 4 or more times per year
9. If you currently have a 401(k), is your plan required to have an independent audit?
 - Yes
 - No

10. If "yes" to #9 above, what are your approximate auditing costs?

11. Would you be interested in potentially pooling your plan along with other members in an effort to negotiate more purchasing power?

- Yes
- No

12. Would you be willing to serve on the board of a joint retirement plan?

- Yes
- No
- I'd think about it

Section 2

FOR COMPANIES OFFERING GROUP MEDICAL INSURANCE

13. Do you currently offer group medical insurance to your employees?

- Yes
- No

14. If you provide medical coverage, who is your insurer?

15. How many employees in your plan?

16. What percentage of employee premium do you contribute?

17. What is your renewal month?

Section 3

FOR COMPANIES OFFERING DENTAL

18. Do you offer dental coverage?

- Yes
- No

19. If you provide DENTAL, who is your insurer?

20. How many employees participate in your dental plan?

21. What percentage of employee premium do you contribute?

22. What is your renewal month?

Section 4

FOR COMPANIES OFFERING VISION

23. Do you offer VISION coverage?
- Yes
 - No
24. If you offer VISION, who is your insurer?
25. How many employees participate in the plan?
26. What percentage of employee premium do you contribute?
27. What is your renewal month?

Section 5

FOR COMPANIES OFFERING LIFE INSURANCE

28. Do you offer LIFE insurance?
- Yes
 - No
29. Who is your insurer?
30. How many employees participate in the plan?
31. What percentage of employee premium do you contribute?
32. What is your renewal month?

Section 6

FOR COMPANIES OFFERING DISABILITY

33. Do you offer DISABILITY?
- Yes
 - No
34. Who is your insurer?
35. How many employees participate in the plan?

36. What percentage of employee premium do you contribute?

37. What is your renewal month?

38. Do you currently work with an insurance agent/broker for your group insurance plan?

- Yes
- No

39. If an association program were established for group insurance, would you consider participating in the program if the benefits and pricing were beneficial?

- Yes
- No
- Not sure

40. Are there other programs/services/products you would like to see offered by the Association?