

How Do You Measure Retirement Plan Success?

A popular measurement of 401(k) plan success is participation rate. However, is that all?



Ways to measure the success of your company's retirement plan:

- Meaningful employee savings rates (average deferral 8%+)
- Analysis of anticipated income replacement ratios
- Appropriate asset allocation
- Lower employee turnover
- Higher attendance at financial wellness meetings and seminars
- High plan participation rates (90%+)
- AND MORE!

Contact us today to strategize ways to measure your 401(k) plan and help to enhance participant outcomes.



SHORELINE
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This information was developed as a general guide to educate plan sponsors and is not intended as authoritative guidance or tax/legal advice. Each plan has unique requirements, and you should consult your attorney or tax advisor for guidance on your specific situation.

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