

TDF Fit Analysis RFI



In order for fiduciaries to make an informed decision regarding their target date funds (TDFs), they must understand their plan's objectives, demographics and participant behaviors. Please work with the plan's recordkeeper to gather pertinent plan and participant data that can be used to populate the TDF Analyzer tool and help determine a best-fit TDF series.

Plan objectives & demographics

Age Band	Average Contribution Rate	Average Account Balance	# of Participants with an Account Balance	# of Terminated Participants with an Account Balance	# of Terminated Participants
20-29					
30-39					
40-49					
50-59					
60-65					
66+					
Plan					

Breakdown of phone calls/web activity:

Most Recent 12-Month Period	
Fund change(s)	Total #:
Deferral change	Total #:
Loan/Hardship assistance	Total #:
Website Visits	Total users:
	Total unique users:
Phone Center	Total users:
	Total unique users:

Participants leaving the plan as a result of retirement

	Participant Total #	% of Total Distributions
Plan Wide		
Ages 65+		

Degree of investment knowledge and plan options

How many participants (if any) are invested in more than one target date fund?	
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