

Attachment 1: Participant Survey

Retirement Plan Pitfalls Workshop (Use IRS Fix-it Guides to Keep Your Clients Out of Trouble)

Workshop Evaluation

The following evaluation should take less than 3 minutes to complete. Your responses will help us improve future workshops. Thank you for taking the time to complete the evaluation.

1. How often do you work with retirement plan issues in your practice? (Please Circle)

Rarely	Occasionally	Frequently
1	2	3

2. The materials presented in the Retirement Plan Pitfalls Workshop (The Workshop) will help you in your job. (Please Circle)

Strongly Disagree	Strongly Agree
1 2 3 4 5	

3. The Workshop was helpful in your understanding of how to find a mistake in a retirement plan.	1 2 3 4 5
4. The Workshop was helpful in your understanding of how to fix a mistake in a retirement plan.	1 2 3 4 5
5. The Workshop was helpful in your understanding of how to avoid a mistake in a retirement plan.	1 2 3 4 5
6. The case study used in The Workshop lessons was helpful in your understanding of how to find a mistake in a retirement plan.	1 2 3 4 5
7. The case study used in The Workshop lessons was helpful in your understanding of how to fix a mistake in a retirement plan.	1 2 3 4 5
8. The case study used in The Workshop lessons was helpful in your understanding of how to avoid a mistake in a retirement plan.	1 2 3 4 5
9. Adequate time was provided for the discussion of Lesson 1 (Benefits of a retirement plan).	1 2 3 4 5

10. Adequate time was provided for the discussion of Lesson 2 (Retirement plan choices).	1	2	3	4	5
11. Adequate time was provided for the discussion of Lesson 3 (Using the Fix-It Guide).	1	2	3	4	5
12. Adequate time was provided for the discussion of Lesson 4 (Web-based products).	1	2	3	4	5
13. The Workshop's handout materials increased your understanding of how to find a mistake in a retirement plan.	1	2	3	4	5
	(Please Circle)				
	Strongly Disagree				Strongly Agree
14. The Workshop's handout materials increased your understanding of how to fix a mistake in a retirement plan.	1	2	3	4	5
15. The Workshop's handout materials increased your understanding of how to avoid a mistake in a retirement plan.	1	2	3	4	5
16. The instructors' knowledge of The Workshop material was comprehensive.	1	2	3	4	5
17. The presentation was at an appropriate technical level for your experience with retirement plan issues.	1	2	3	4	5
18. You will take the information provided in The Workshop back to your office and use it for your work with retirement plan issues.	1	2	3	4	5

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests along with the address where you can send comments regarding the study. The OMB number for this study is 1545-1432. If you have any comments regarding this study, please write to:

IRS, Tax Products Coordinating Committee
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