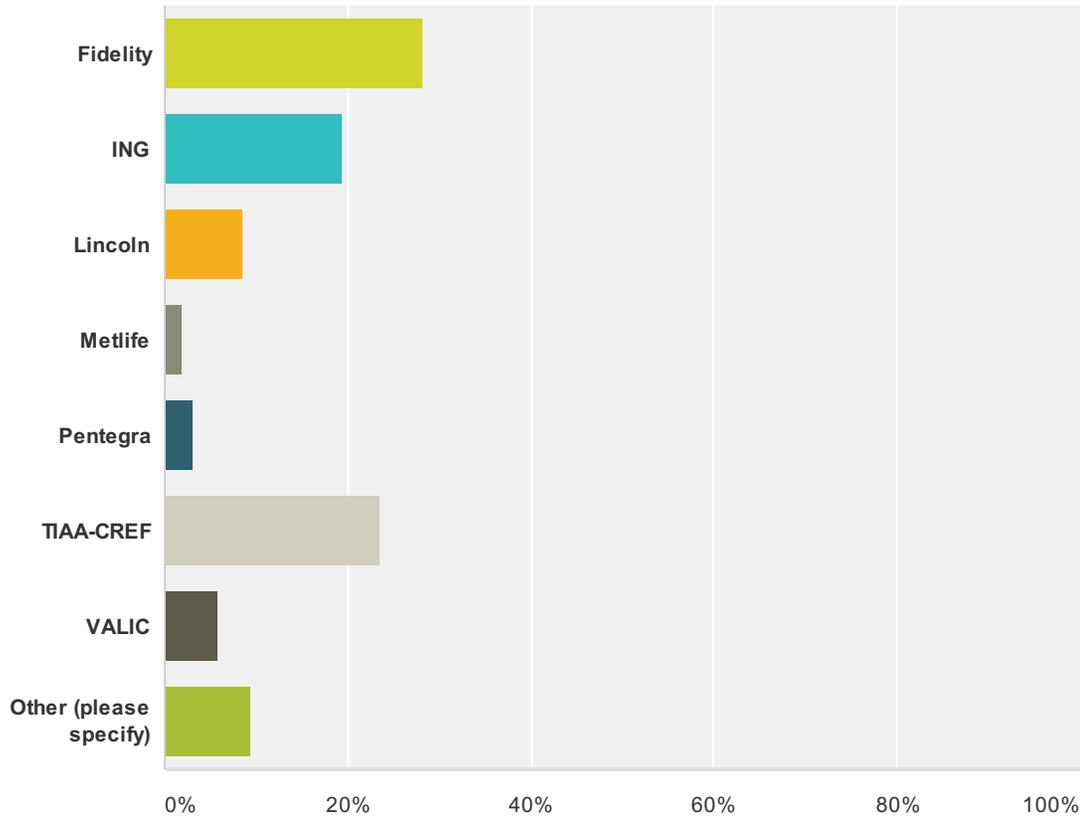


### Q1 Who is your current ORP vendor

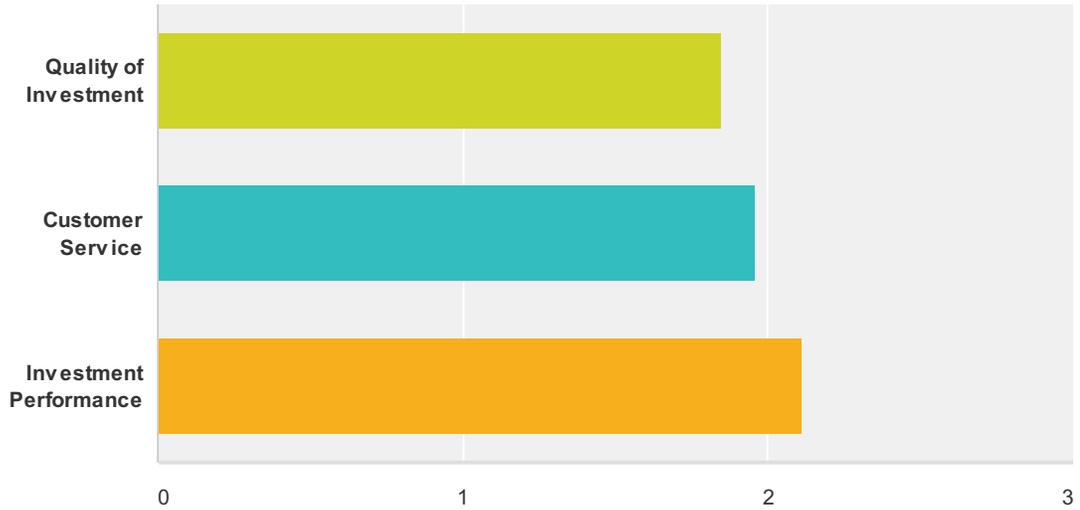
Answered: 847 Skipped: 6



Answer Choices	Responses
Fidelity	28.22% 239
ING	19.36% 164
Lincoln	8.50% 72
Metlife	1.89% 16
Pentegra	3.19% 27
TIAA-CREF	23.49% 199
VALIC	5.90% 50
Other (please specify)	9.45% 80
<b>Total</b>	<b>847</b>

**Q2 Please rate your current ORP vendor on the following:**

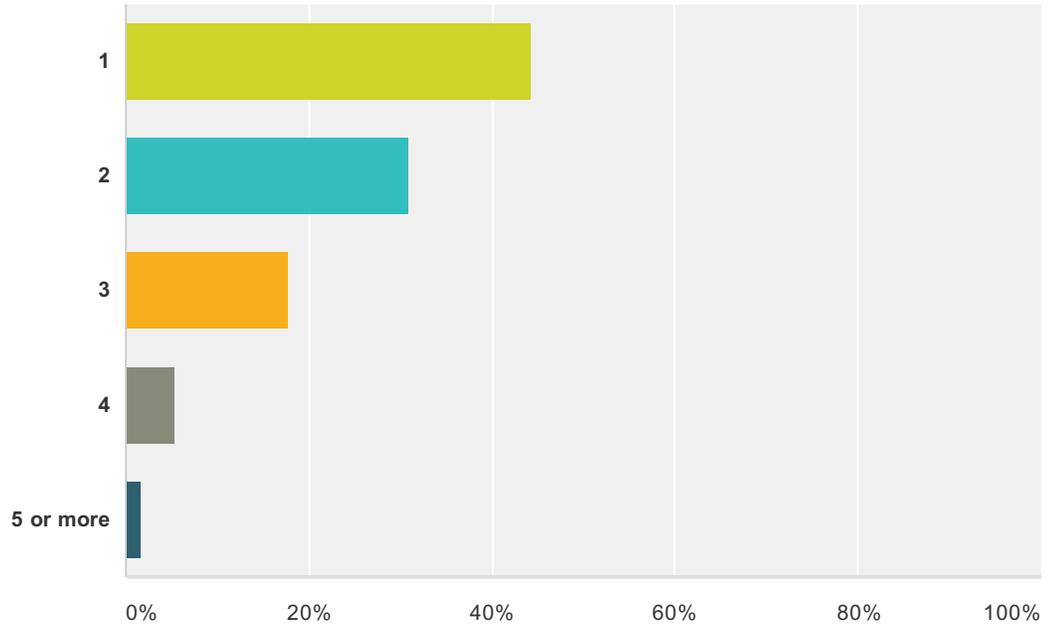
Answered: 840 Skipped: 13



	Excellent	(no label)	(no label)	(no label)	Unacceptable	Total	Average Rating
Quality of Investment	<b>40.65%</b> 339	<b>38.49%</b> 321	<b>17.15%</b> 143	<b>2.88%</b> 24	<b>0.84%</b> 7	834	1.85
Customer Service	<b>41.77%</b> 345	<b>31.72%</b> 262	<b>17.55%</b> 145	<b>7.02%</b> 58	<b>1.94%</b> 16	826	1.96
Investment Performance	<b>28.35%</b> 233	<b>41.97%</b> 345	<b>21.29%</b> 175	<b>6.69%</b> 55	<b>1.70%</b> 14	822	2.11

### Q3 How many different vendors have you used during your participation in ORP?

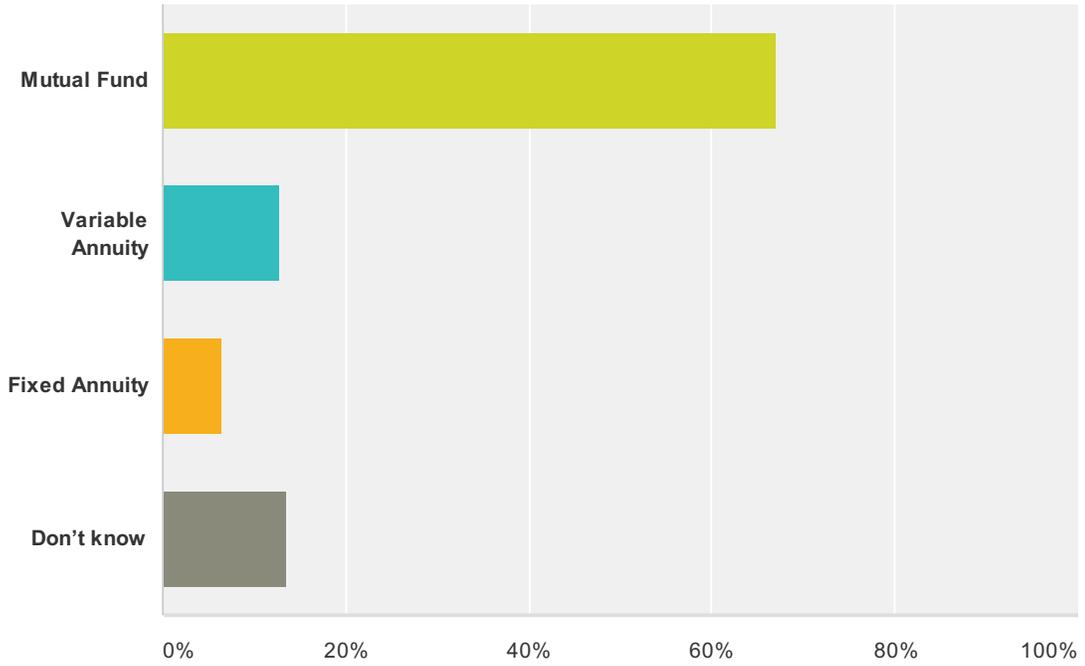
Answered: 846 Skipped: 7



Answer Choices	Responses	
1	44.21%	374
2	30.97%	262
3	17.73%	150
4	5.44%	46
5 or more	1.65%	14
<b>Total</b>		<b>846</b>

### Q4 Which is your primary investment vehicle?

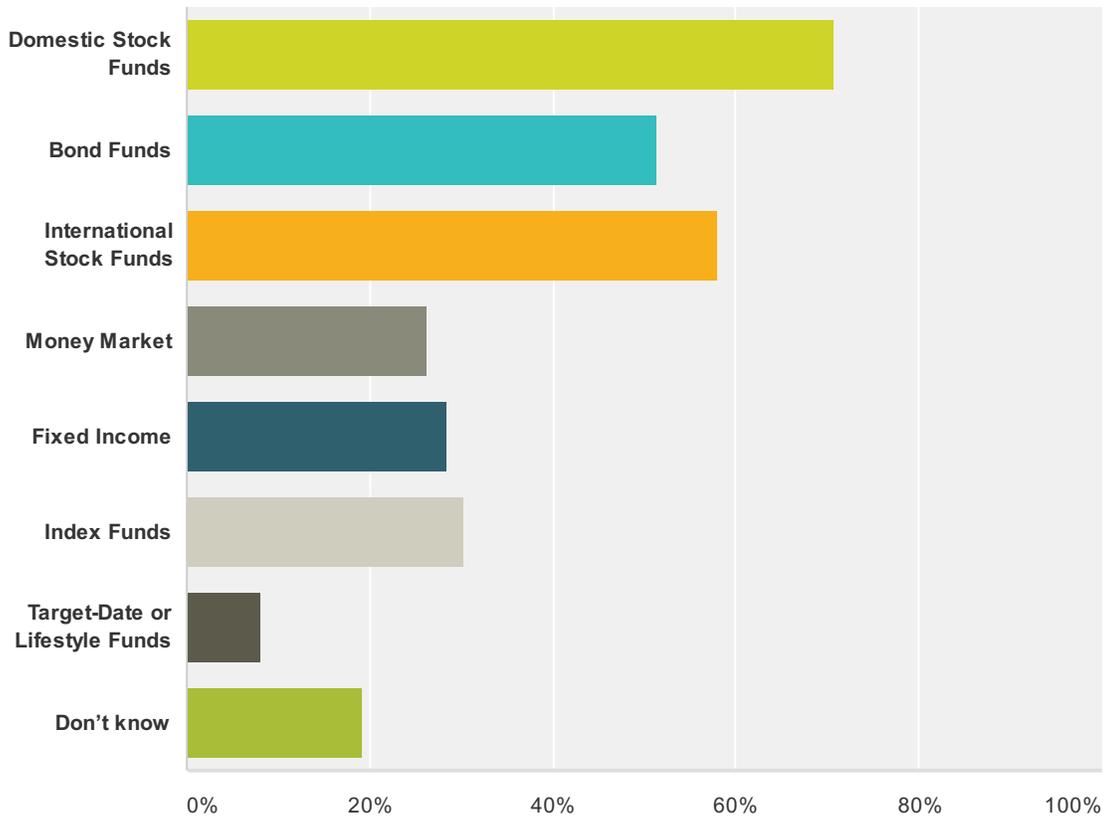
Answered: 839 Skipped: 14



Answer Choices	Responses
Mutual Fund	67.10% 563
Variable Annuity	12.75% 107
Fixed Annuity	6.56% 55
Don't know	13.59% 114
<b>Total</b>	<b>839</b>

### Q5 Within your primary investment vehicle, what types of investments do you use? (check all that apply)

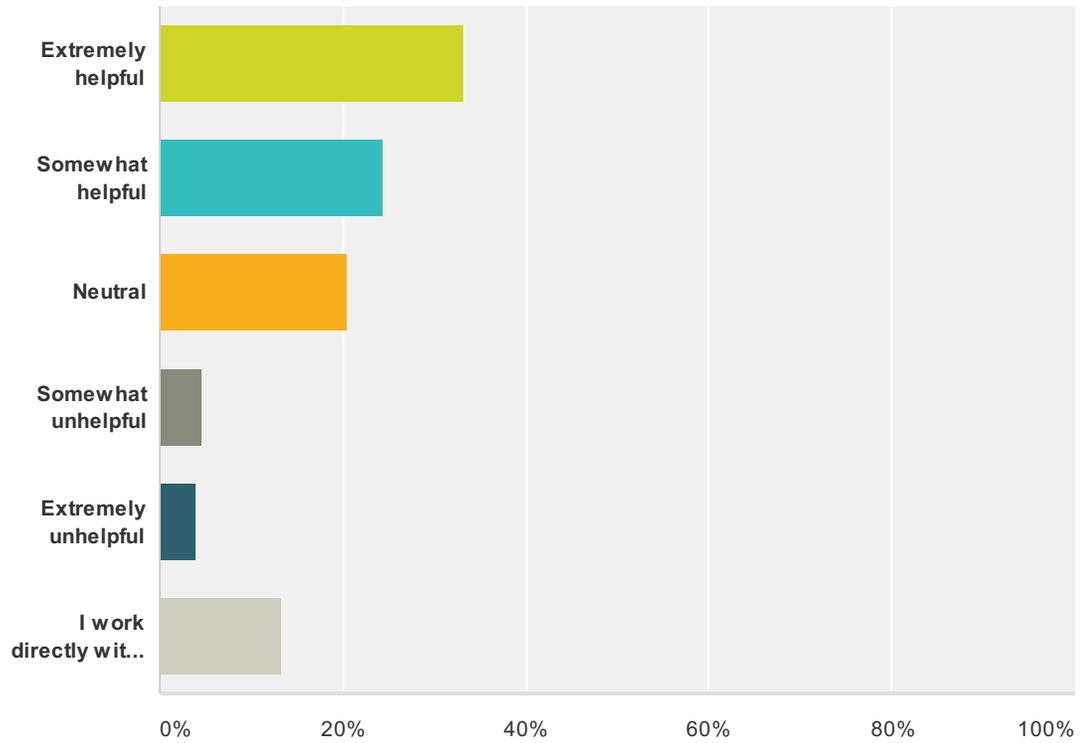
Answered: 846 Skipped: 7



Answer Choices	Responses
Domestic Stock Funds	70.69% 598
Bond Funds	51.42% 435
International Stock Funds	58.04% 491
Money Market	26.36% 223
Fixed Income	28.37% 240
Index Funds	30.26% 256
Target-Date or Lifestyle Funds	8.04% 68
Don't know	19.15% 162
<b>Total Respondents: 846</b>	

### Q6 How helpful has your ORP vendor representative been?

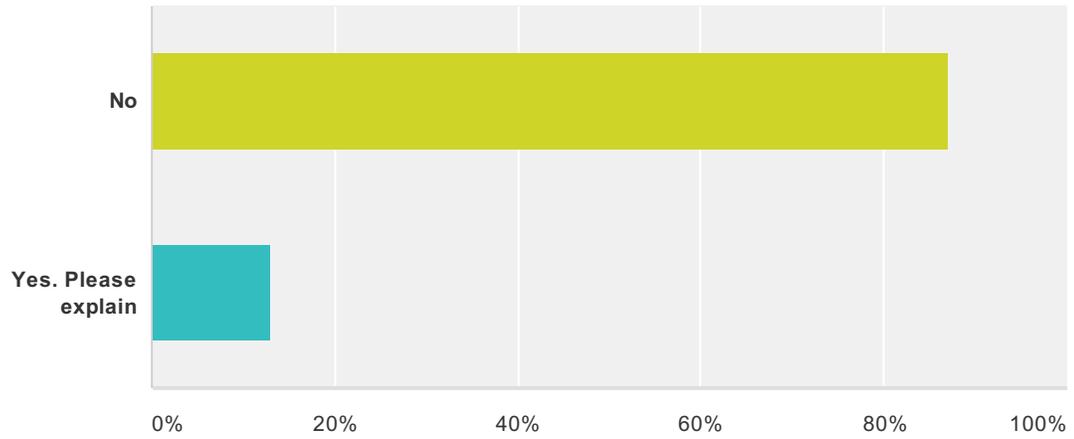
Answered: 840 Skipped: 13



Answer Choices	Responses
Extremely helpful	33.10% 278
Somewhat helpful	24.52% 206
Neutral	20.36% 171
Somewhat unhelpful	4.64% 39
Extremely unhelpful	4.05% 34
I work directly with the vendor and do not work with a representative	13.33% 112
<b>Total</b>	<b>840</b>

### Q7 Have you had any major service problems with your vendor?

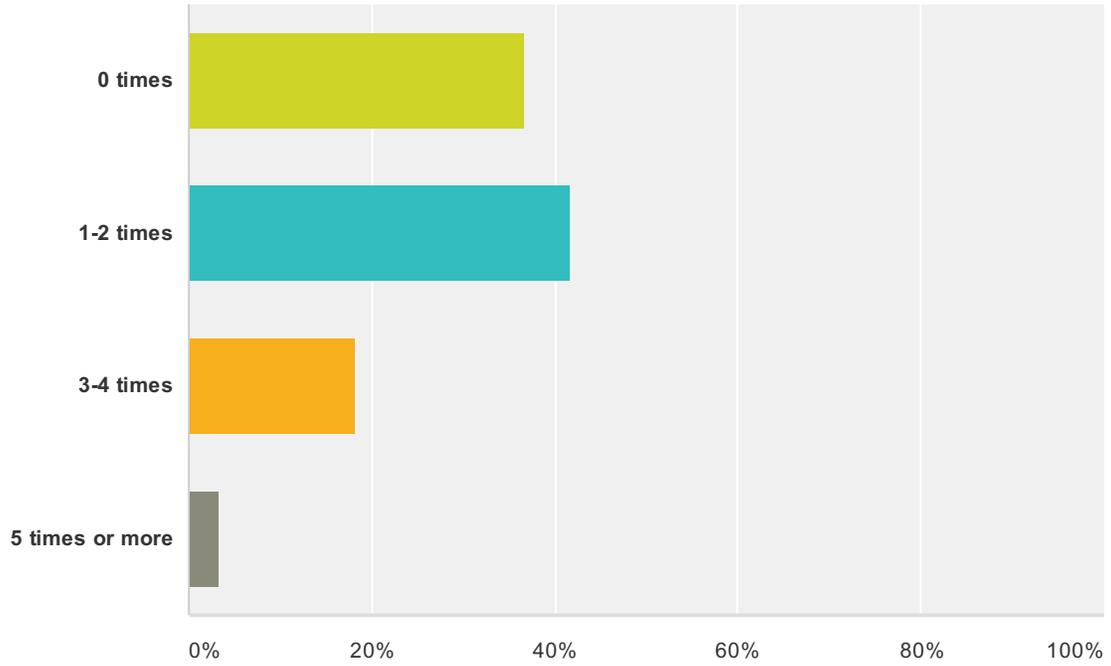
Answered: 838 Skipped: 15



Answer Choices	Responses
No	86.99% 729
Yes. Please explain	13.01% 109
<b>Total</b>	<b>838</b>

### Q8 In the last 12 months, how many times have you contacted your ORP vendor?

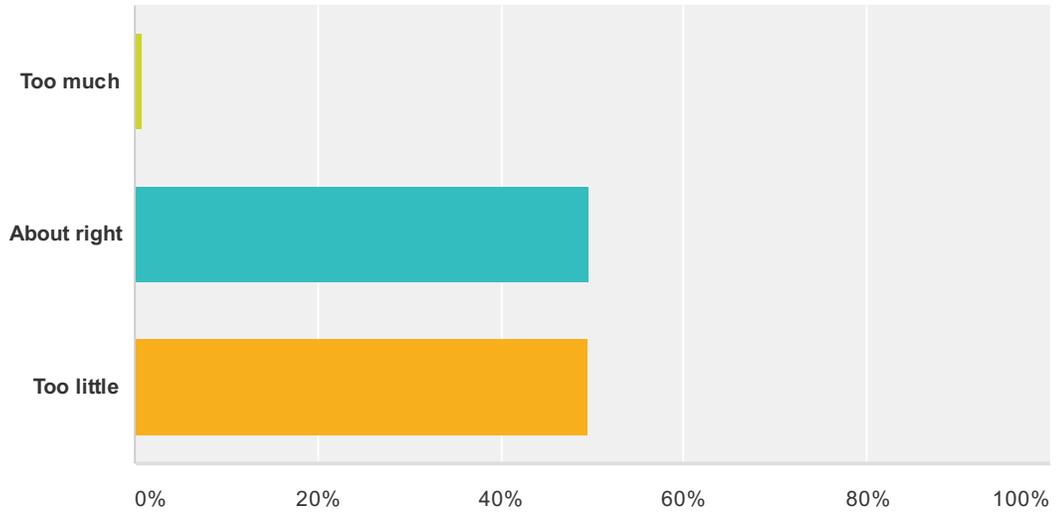
Answered: 845 Skipped: 8



Answer Choices	Responses
0 times	36.80% 311
1-2 times	41.66% 352
3-4 times	18.11% 153
5 times or more	3.43% 29
<b>Total</b>	<b>845</b>

**Q9 When you became eligible to participate in the ORP program, how much information did you receive from your Human Resources and/or Payroll office?**

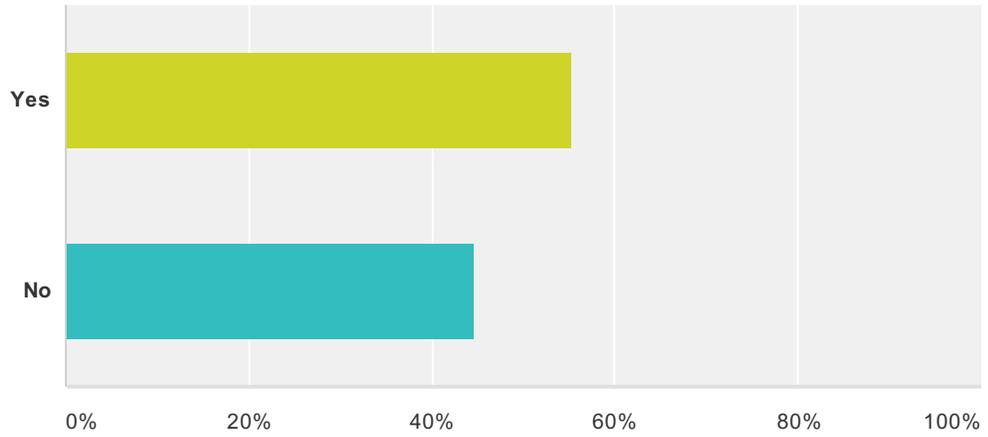
Answered: 837 Skipped: 16



Answer Choices	Responses
Too much	0.84% 7
About right	49.70% 416
Too little	49.46% 414
<b>Total</b>	<b>837</b>

**Q10 Were the ORP materials provided by your Human Resources and/or Payroll office easy to understand?**

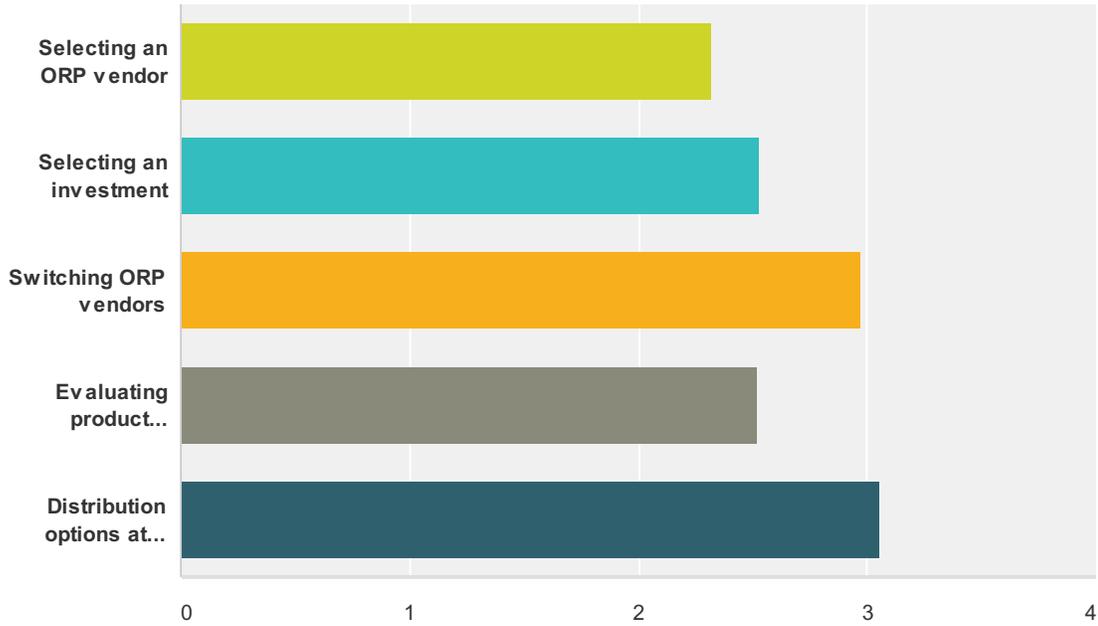
Answered: 816 Skipped: 37



Answer Choices	Responses
Yes	55.39% 452
No	44.61% 364
<b>Total</b>	<b>816</b>

### Q11 Please rate your confidence level in the following:

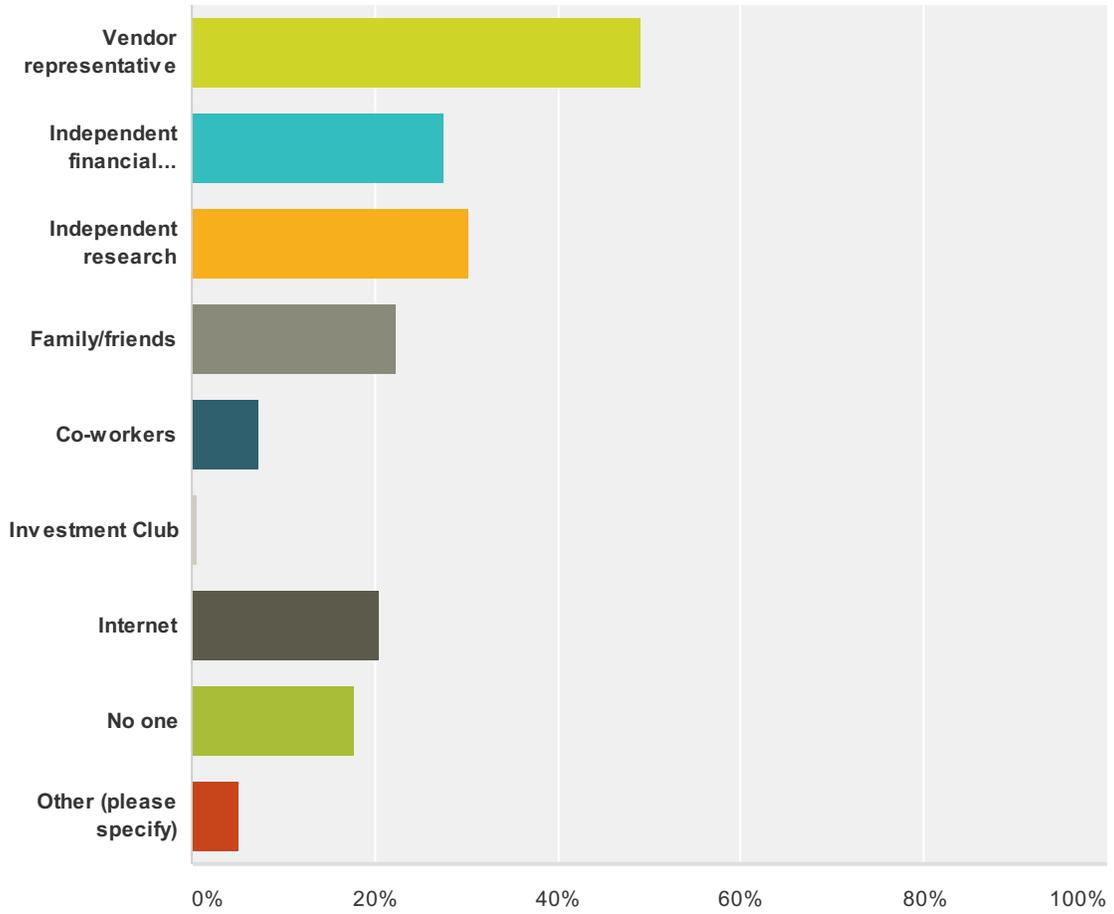
Answered: 844 Skipped: 9



	Very Confident	(no label)	(no label)	(no label)	Not Confident	Total	Average Rating
Selecting an ORP vendor	34.20% 288	28.27% 238	18.65% 157	9.14% 77	9.74% 82	842	2.32
Selecting an investment	25.12% 211	30% 252	22.86% 192	10.83% 91	11.19% 94	840	2.53
Switching ORP vendors	18.87% 153	21.09% 171	24.66% 200	15.29% 124	20.10% 163	811	2.97
Evaluating product performance	23.72% 199	31.35% 263	23.12% 194	12.51% 105	9.30% 78	839	2.52
Distribution options at retirement	12.56% 104	23.79% 197	26.45% 219	19.69% 163	17.51% 145	828	3.06

### Q12 Who provides you with financial and retirement planning assistance? (check all that apply)

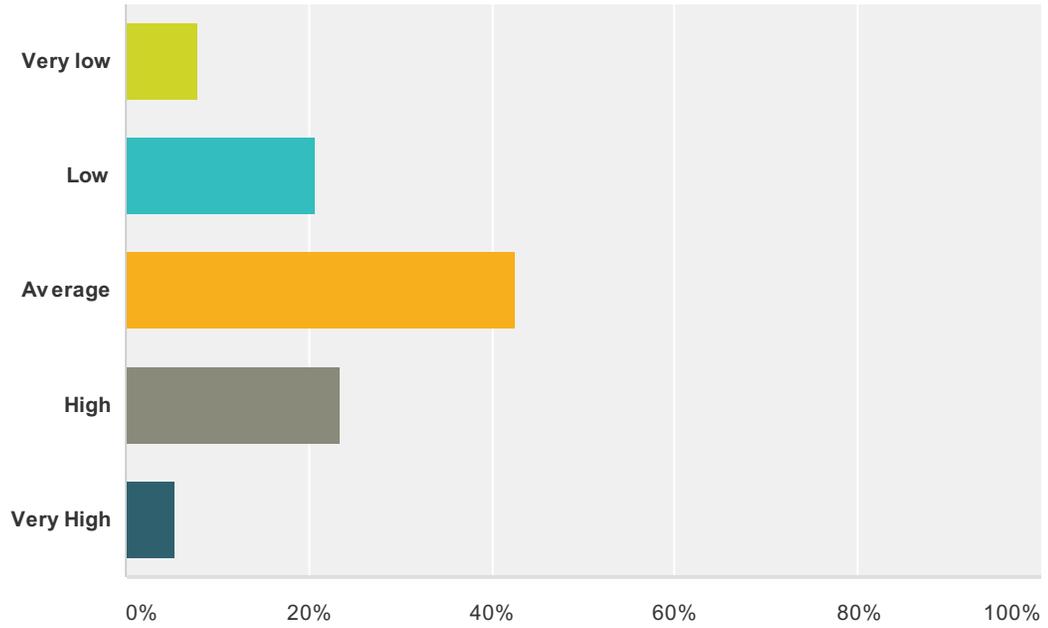
Answered: 847 Skipped: 6



Answer Choices	Responses
Vendor representative	49.00% 415
Independent financial planner	27.63% 234
Independent research	30.34% 257
Family/friends	22.31% 189
Co-workers	7.32% 62
Investment Club	0.71% 6
Internet	20.43% 173
No one	17.83% 151
Other (please specify)	5.31% 45
<b>Total Respondents: 847</b>	

### Q13 How would you describe your level of investment knowledge?

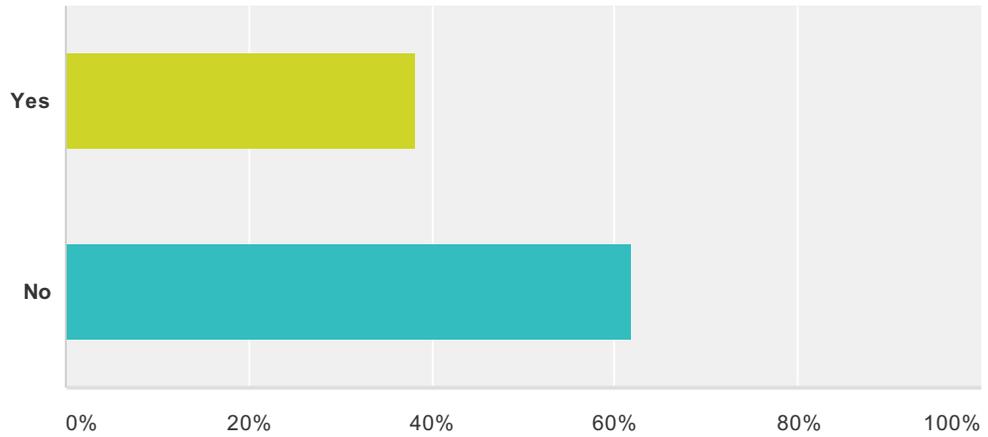
Answered: 846 Skipped: 7



Answer Choices	Responses
Very low	7.92% 67
Low	20.69% 175
Average	42.55% 360
High	23.40% 198
Very High	5.44% 46
<b>Total</b>	<b>846</b>

**Q14 Have you ever visited the System Benefits Administration Retirement Programs website (<http://www.tamus.edu/offices/benefits/retirement/>) to obtain information about ORP?**

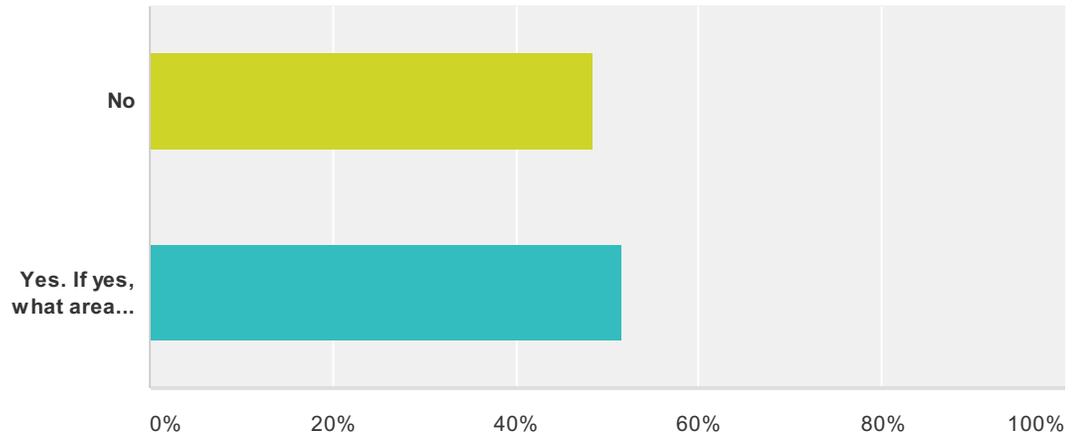
Answered: 842 Skipped: 11



Answer Choices	Responses
Yes	38.12% 321
No	61.88% 521
<b>Total</b>	<b>842</b>

### Q15 Would you like more financial education offered by your employer?

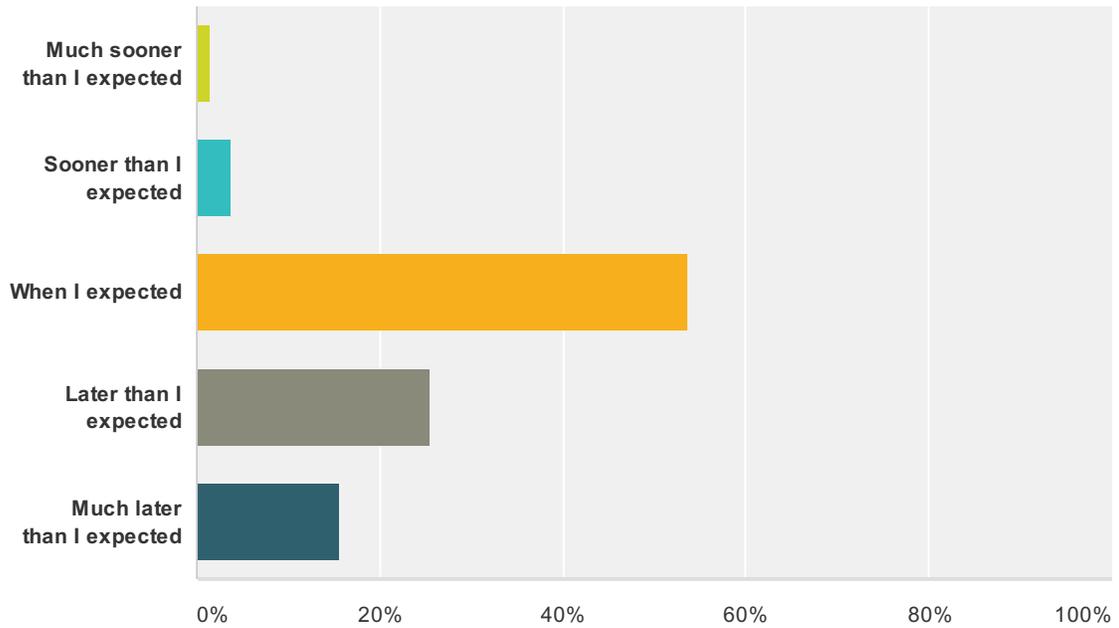
Answered: 825 Skipped: 28



Answer Choices	Responses	
No	48.36%	399
Yes. If yes, what area interests you most?	51.64%	426
<b>Total</b>		<b>825</b>

### Q16 As a result of your participation in ORP, when will you be able to retire?

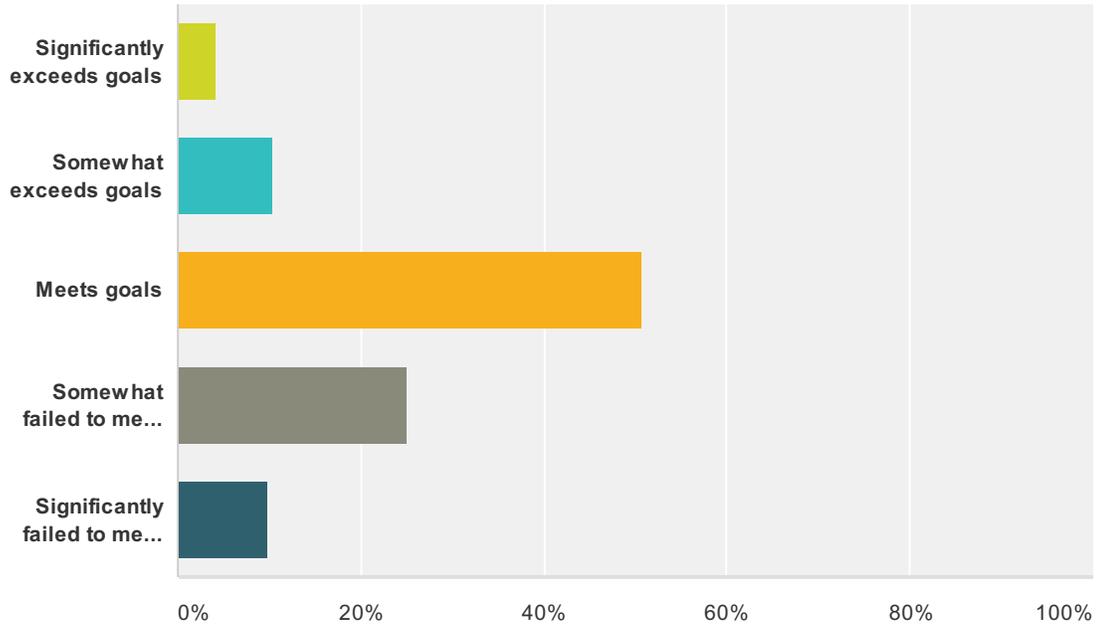
Answered: 831 Skipped: 22



Answer Choices	Responses
Much sooner than I expected	1.44% 12
Sooner than I expected	3.85% 32
When I expected	53.67% 446
Later than I expected	25.39% 211
Much later than I expected	15.64% 130
<b>Total</b>	<b>831</b>

### Q17 Is ORP meeting your retirement financial goals?

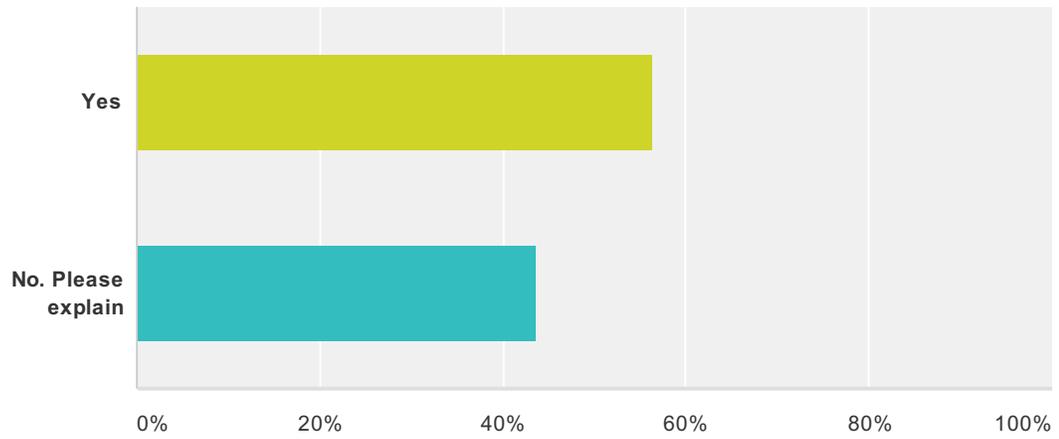
Answered: 831 Skipped: 22



Answer Choices	Responses
Significantly exceeds goals	4.09% 34
Somewhat exceeds goals	10.35% 86
Meets goals	50.66% 421
Somewhat failed to meet goals	25.03% 208
Significantly failed to meet goals	9.87% 82
<b>Total</b>	<b>831</b>

### Q18 If you could go back and choose again between ORP and TRS, would you make the same selection?

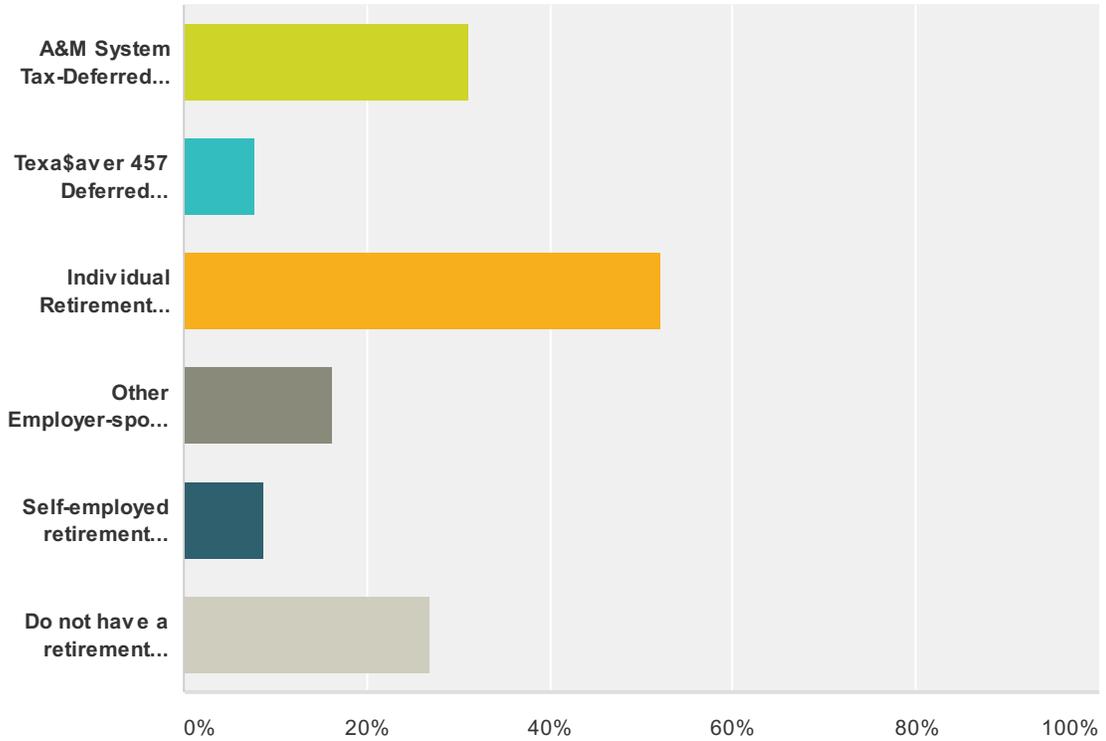
Answered: 835 Skipped: 18



Answer Choices	Responses
Yes	56.29% 470
No. Please explain	43.71% 365
<b>Total</b>	<b>835</b>

### Q19 Do you have additional retirement accounts outside of the Texas ORP program? (check all that apply)

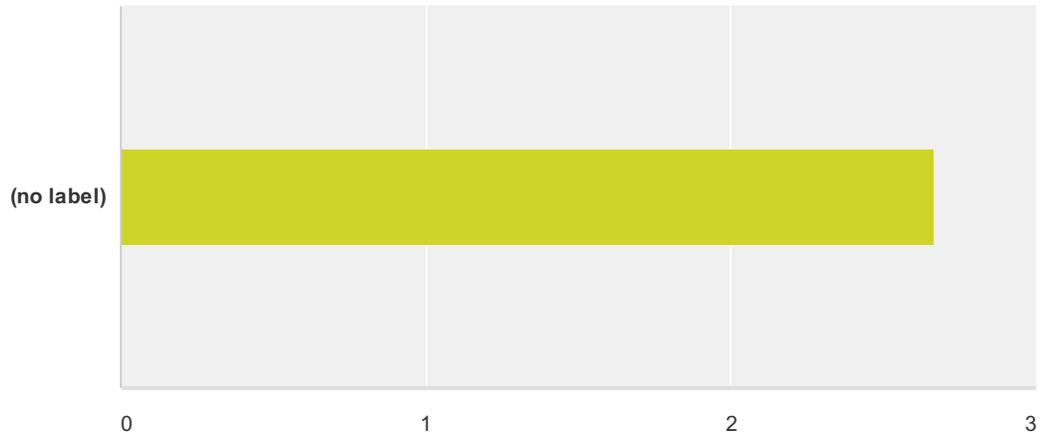
Answered: 818 Skipped: 35



Answer Choices	Responses
A&M System Tax-Deferred Account (TDA)	31.17% 255
TexaSaver 457 Deferred Compensation Plan (DCP)	7.70% 63
Individual Retirement Account (IRA)	52.20% 427
Other Employer-sponsored Retirement Account	16.38% 134
Self-employed retirement account	8.80% 72
Do not have a retirement account other than ORP	27.02% 221
<b>Total Respondents: 818</b>	

### Q20 Overall, how secure do you feel about your retirement savings?

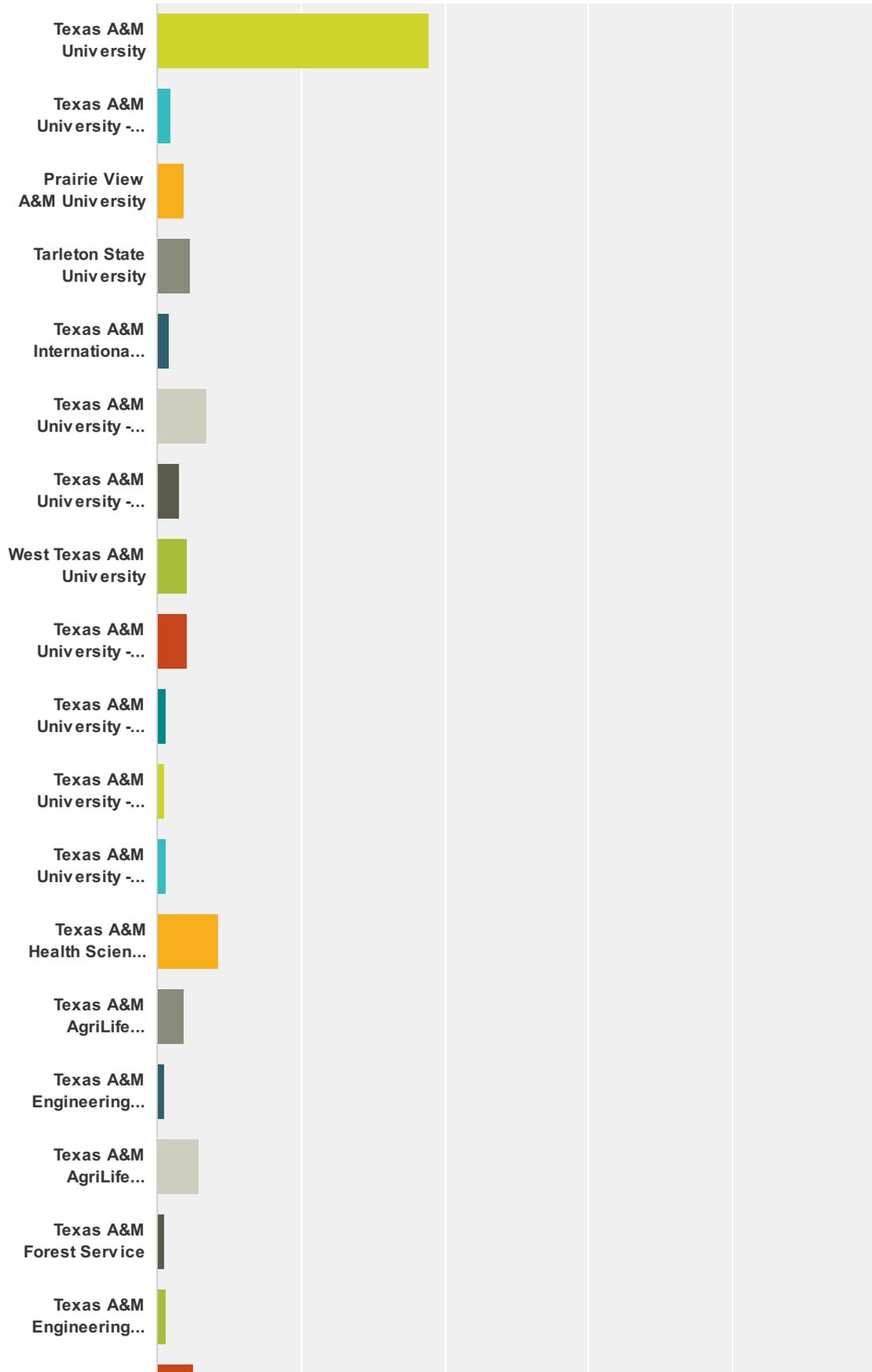
Answered: 822 Skipped: 31



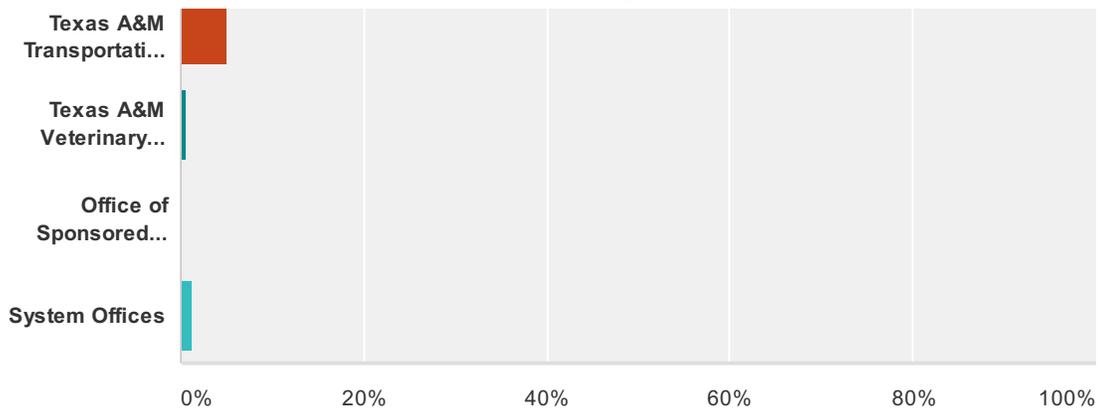
	Very Secure	(no label)	(no label)	(no label)	Very Insecure	Total	Average Rating
(no label)	17.40% 143	32.73% 269	26.40% 217	12.90% 106	10.58% 87	822	2.67

## Q21 Where are you employed in the A&M System?

Answered: 846 Skipped: 7



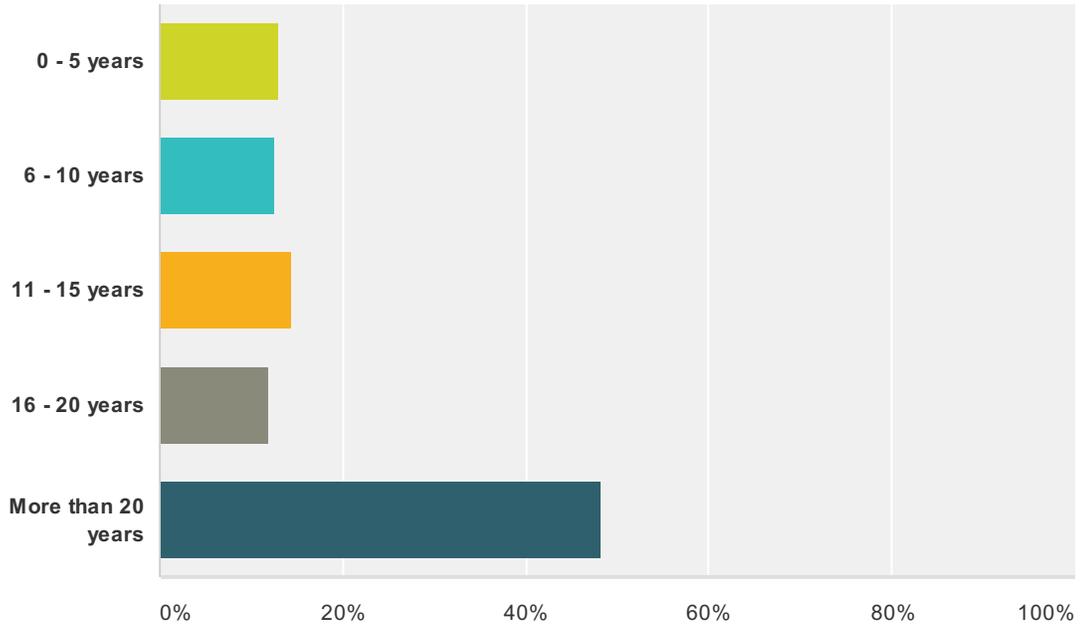
# ORP 45th Anniversary Survey



Answer Choices	Responses	
Texas A&M University	37.71%	319
Texas A&M University - Galveston	1.89%	16
Prairie View A&M University	3.66%	31
Tarleton State University	4.49%	38
Texas A&M International University	1.65%	14
Texas A&M University - Corpus Christi	6.97%	59
Texas A&M University - Kingsville	3.19%	27
West Texas A&M University	4.26%	36
Texas A&M University - Commerce	4.14%	35
Texas A&M University - Texarkana	1.18%	10
Texas A&M University - Central Texas	0.95%	8
Texas A&M University - San Antonio	1.30%	11
Texas A&M Health Science Center	8.63%	73
Texas A&M AgriLife Research	3.78%	32
Texas A&M Engineering Experiment Station	0.95%	8
Texas A&M AgriLife Extension Service	5.79%	49
Texas A&M Forest Service	1.06%	9
Texas A&M Engineering Extension Service	1.30%	11
Texas A&M Transportation Institute	5.08%	43
Texas A&M Veterinary Medical Diagnostic Laboratory	0.59%	5
Office of Sponsored Research	0.12%	1
System Offices	1.30%	11
<b>Total</b>		<b>846</b>

### Q22 How long have you participated in the ORP program?

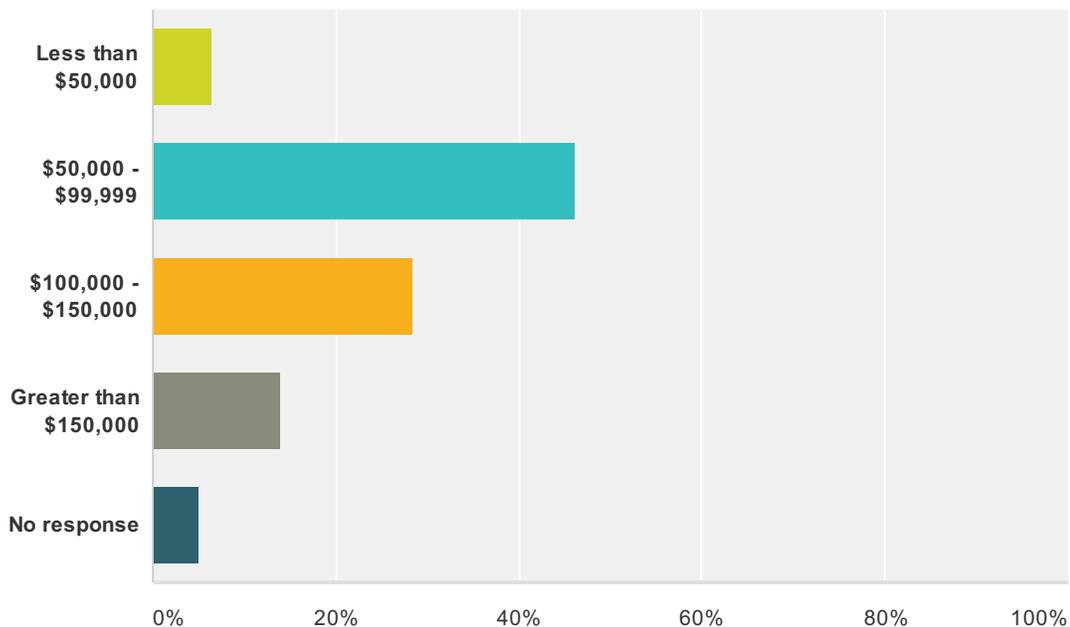
Answered: 845 Skipped: 8



Answer Choices	Responses	Count
0 - 5 years	13.02%	110
6 - 10 years	12.43%	105
11 - 15 years	14.44%	122
16 - 20 years	11.83%	100
More than 20 years	48.28%	408
<b>Total</b>		<b>845</b>

### Q23 What is your current salary?

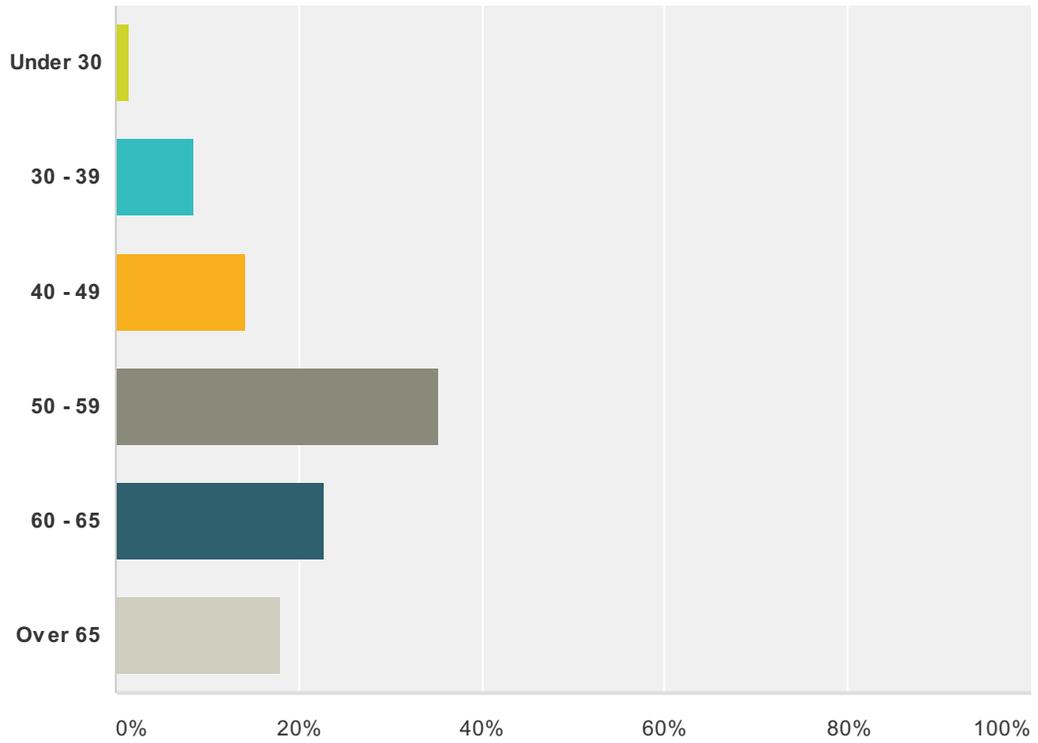
Answered: 838 Skipped: 15



Answer Choices	Responses
Less than \$50,000	6.44% 54
\$50,000 - \$99,999	46.06% 386
\$100,000 - \$150,000	28.40% 238
Greater than \$150,000	14.08% 118
No response	5.01% 42
<b>Total</b>	<b>838</b>

### Q24 What is your current age?

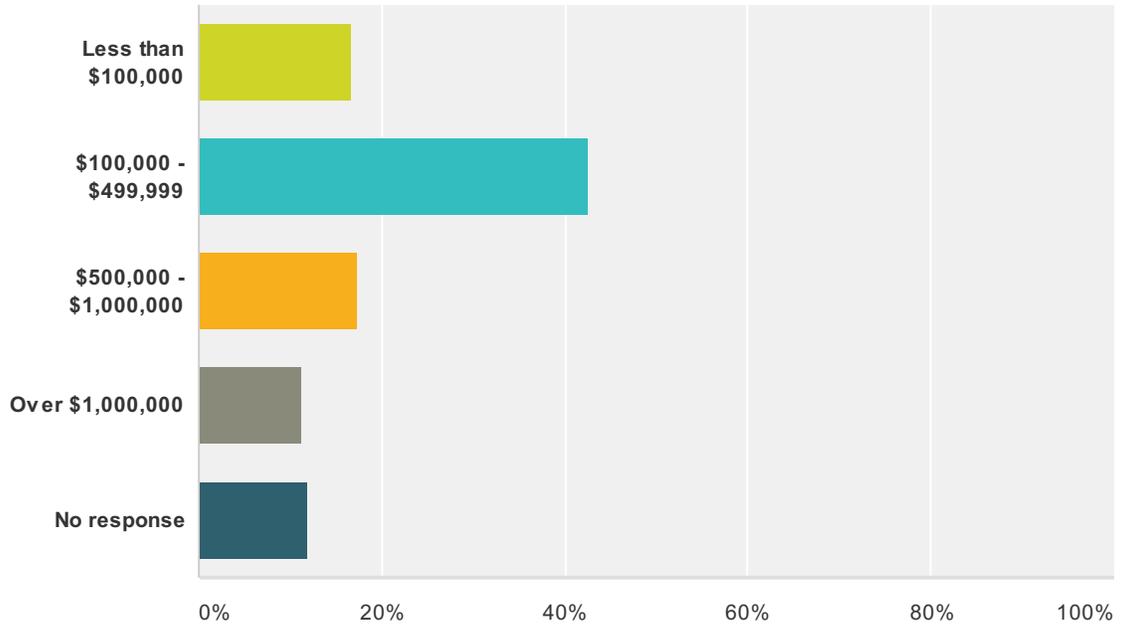
Answered: 839 Skipped: 14



Answer Choices	Responses
Under 30	1.43% 12
30 - 39	8.46% 71
40 - 49	14.18% 119
50 - 59	35.28% 296
60 - 65	22.77% 191
Over 65	17.88% 150
<b>Total</b>	<b>839</b>

**Q25 What is your total current ORP account balance? (Include all Texas ORP accounts from past and present vendors)**

Answered: 841 Skipped: 12



Answer Choices	Responses
Less than \$100,000	16.77% 141
\$100,000 - \$499,999	42.69% 359
\$500,000 - \$1,000,000	17.36% 146
Over \$1,000,000	11.30% 95
No response	11.89% 100
<b>Total</b>	<b>841</b>