

# Year-end Separations Survey Results

01/01/2008-12/29/2008

The following is a tabular depiction of the responses to each survey question.

## Section - Questions

### 1. How would you rate your overall experience with PERSI?

50.9%	142	Met expectations
45.9%	128	Exceeded expectations
3.2%	9	Below expectations

### 2. In general, how satisfied were you with the separation process?

82.1%	230	Very satisfied
8.2%	23	Somewhat satisfied
5.7%	16	Neither satisfied nor dissatisfied
2.9%	8	Very dissatisfied
1.1%	3	Somewhat dissatisfied

### 3. Did you speak with a PERSI representative about withdrawing your Base Plan account?

74.5%	199	Yes
22.5%	60	No
3.0%	8	Don't remember

### 4. If yes, did the PERSI representative explain the withdrawal process and timeline to you?

84.5%	186	Yes
9.5%	21	No
5.9%	13	Don't remember

### 5. How many times did you contact PERSI about your separation benefit payment?

54.1%	139	Once
30.7%	79	Twice
11.7%	30	Three times
1.9%	5	More than 5 times
1.6%	4	Four times

### 6. Did a PERSI representative explain that if you had 60 months or more of PERSI service you were vested to receive a lifetime benefit?

52.1%	126	Yes
34.7%	84	No
13.2%	32	Don't remember

**7. Were you told about the tax consequences of withdrawing your money?**

82.7%	215	Yes
11.5%	30	No
5.8%	15	Don't remember

**8. How would you rate the overall service provided by the PERSI representative?**

47.2%	117	Excellent
34.7%	86	Very good
14.5%	36	Good
2.4%	6	Poor
1.2%	3	Fair

**9. How much time lapsed from when you submitted a Base Plan Account Withdrawal form to PERSI until you actually received a check?**

49.5%	136	Within 2 weeks
23.6%	65	Within 1 week
22.5%	62	Within a month
4.4%	12	Longer than a month

**10. How easy or difficult was it to complete the Base Plan Account Withdrawal form?**

78.4%	210	Very easy
16.8%	45	Somewhat easy
3.7%	10	Neither easy nor difficult
1.1%	3	Somewhat difficult

**11. Before completing the Base Plan Account Withdrawal form, did you read the informational sheet that explained your options?**

87.7%	236	Yes
7.1%	19	No
5.2%	14	Don't remember

**12. If yes, how helpful did you find the information?**

55.9%	146	Very helpful
30.7%	80	Somewhat helpful
8.8%	23	N/A
4.2%	11	No opinion
0.4%	1	Not helpful

**13. Did you visit the PERSI Web site to learn more about withdrawing your Base Plan account balance?**

55.7%	147	Yes
43.6%	115	No
0.8%	2	Don't remember

**14. If yes, how helpful was the information?**

40.2%	84	Very helpful
28.2%	59	Somewhat helpful
25.8%	54	N/A
3.3%	7	Not helpful
2.4%	5	No opinion

**15. Did you discuss withdrawing your Base Plan funds with your former employer?**

77.4%	206	No
19.9%	53	Yes
2.6%	7	Don't remember

**16. If you did, what do you recall being told?**

31.6%	30	I wasn't told anything
28.4%	27	I could leave my money in PERSI
15.8%	15	Other:
14.7%	14	I don't remember
9.5%	9	I had to withdraw my funds

**17. Why did you elect to withdraw your Base Plan money?**

52.6%	133	Financial reasons
17.8%	45	Relocating
14.6%	37	To roll it into another plan
6.3%	16	Other:
5.9%	15	I thought I had no choice
2.8%	7	Divorce