

Retirement Account Checklist

Fees and Features	IRA with Custodian A	IRA with Custodian B	New Employer's 401(k) Plan
Investment options available			
Investment fees and expenses			
Annual account & other fees			
Services available (e.g., investment advice, tools & calculators)			
Ability to continue contributions			
Type of account (pre-tax & Roth)			
Loans available			
Withdrawal options			