

Challenge the Process Worksheet

Process the Challenge	Goal or Improvement sought	Alignment with Board Principles & Statement of Investment Beliefs	Risk Assessment: increases risk, decreases risk, risk neutral	Identify as: <ul style="list-style-type: none"> • Defer • Reject • Action Item
Should we allow ex-spouses to remain in the Plans?				
Should we allow regular and voluntary investment directions to be different?				
Should we allow investment directions for past and future contributions to be different?				

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Should we allow voluntary contributions at all?				
Should we allow transfers in or out?				
Should we allow terminated members to stay in the plans?				