

Topical Evaluation

General Session: Rating

5	4	3	2	1	0	Avg
7	3	0	0	0	0	4.7

General Session: Time Spent

	<u># Responses</u>
OK	9
Too Much	1

Audit Planning: Rating

5	4	3	2	1	0	Avg
7	2	1	0	0	0	4.6

Audit Planning: Time Spent

	<u># Responses</u>
OK	10

Eligibility: Rating

5	4	3	2	1	0	Avg
7	2	1	0	0	0	4.6

Eligibility: Time Spent

	<u># Responses</u>
OK	10

Contributions: Rating

5	4	3	2	1	0	Avg
7	2	1	0	0	0	4.6

Contributions: Time Spent

	<u># Responses</u>
OK	10

Investment Elections: Rating

5	4	3	2	1	0	Avg
6	3	0	1	0	0	4.4

Investment Elections: Time Spent

	<u># Responses</u>
OK	6
Too Little	4

Participant Income: Rating

5	4	3	2	1	0	Avg
8	2	0	0	0	0	4.8

Topical Evaluation

Participant Income: Time Spent

	<u># Responses</u>
OK	10

Distributions, Loans and Expenses: Rating

5	4	3	2	1	0	Avg
8	2	0	0	0	0	4.8

Distributions, Loans and Expenses: Time Spent

	<u># Responses</u>
OK	9
Too Little	1

Investments: Rating

5	4	3	2	1	0	Avg
6	4	0	0	0	0	4.6

Investments: Time Spent

	<u># Responses</u>
OK	8
Too Little	1
Too Much	1

Financial Statements: Rating

5	4	3	2	1	0	Avg
6	4	0	0	0	0	4.6

Financial Statements: Time Spent

	<u># Responses</u>
OK	9
Too Little	1

Wrap Up and Communication: Rating

5	4	3	2	1	0	Avg
5	5	0	0	0	0	4.5

Wrap Up and Communication: Time Spent

	<u># Responses</u>
OK	10

Actuarial Reports: Rating

5	4	3	2	1	0	Avg
1	3	3	0	0	2	2.9

Actuarial Reports: Time Spent

	<u># Responses</u>
OK	6
Too Little	3

Topical Evaluation

Participant Data: Rating

5	4	3	2	1	0	Avg
6	2	0	0	0	1	4.2

Participant Data: Time Spent

	# Responses
OK	9

If you ranked topics low, indicate any that were not relevant to your needs:

Actuarial Reports,Participant Data
General Session,Actuarial Reports
General Session,Audit Planning,Eligibility,Contributions,Investment Elections,Participant
Income,Distributions, Loans and Expenses,Investments,Financial Statements,Wrap Up
and Communication,Participant Data

If you ranked topics low, please indicate any that were too elementary:

If you ranked any topics low, please indicate any that were too advanced:

Observations about the course:

This was a wonderful course, with great materials that had examples of work papers which is going to be very useful for my firm.

I really do think the small class size was beneficial to me. We could bounce ideas and interact.

All information discussed was relevant. Great use of time.

There was a lot of material to cover in the course and the class could have been extended to be 2 full 8 hours days to get into more depth/discussion. Also, it would have been nice to have more examples to work through. However, given the time allowed, the instructors made it through the most important sections of the material and the class was very helpful.

Time allocated to sections and course content was appropriate. Personally, I got more out of it when the attendees were encouraged to share what they were doing in their firms.

I wish we could have covered actuarial reports and touched more on MLCs (MLPs). Finding ways to make a mandatory audit be a value add is critical to retaining business and it would be helpful to know some constructive comments to make.

Most beneficial AGN training I've ever been to.

Please suggest any additional topics that would be relevant to someone at this state of their career:

Internal Control documentation

I think I would have liked to see some of the testing procedures and workpapers in a little more detail. I think for a staff level accountant who does most of field work testing, new ideas, thoughts and approaches to field work would be beneficial.

SAS 103 standards

See general observations.

I'd like to spend more time on actuarial reports and management points.

Program Evaluation

Program materials were relevant and contributed to achieving learning objectives:

5	4	3	2	1	0	Avg
7	4	0	0	0	0	4.6

Learning Objectives were met:

5	4	3	2	1	0	Avg
9	1	0	0	0	0	4.9

Program materials were accurate:

5	4	3	2	1	0	Avg
9	2	0	0	0	0	4.8

Handouts were satisfactory:

5	4	3	2	1	0	Avg
8	2	0	0	0	0	4.8

Facilities and technical equipment were appropriate:

5	4	3	2	1	0	Avg
2	2	6	1	0	0	3.5

Audio/visual materials were effective:

5	4	3	2	1	0	Avg
4	2	4	0	1	0	3.7

Effectiveness of Chris Rouse:

5	4	3	2	1	0	Avg
7	2	1	0	0	0	4.6

Comments on Chris Rouse:

Great instructor!

Chris is very knowledgeable in EBP audits. As a firm that works on smaller plans, I think some of the approaches were for more larger plans, but I did enjoy learning new approaches and concepts that Chris is so knowledgeable about and that I can share with my firm.

Chris was great. Knew the information and taught it in a simple way.

Needs to highlight editorial comments (i.e., if it's his preference but not an absolute requirement, he should let participants know). Other than that, great job!

Chris was very knowledgeable about the material and added some great ways to think outside the box regarding EBPs based on his discussions with the DOL and his experience. Really appreciated Windham Brannon sharing some of their audit forms and programs with the rest of the class.

Chris was very knowledgeable about the subject matter, but tended to talk at you rather than allow the class to be interactive. I think the class would have been better if it was 70% presentation and 30% round-table discussion.

It was a pleasure to listen to him. He is clearly brilliant. It was however a bit long to listen to a lecture that long!

Great speaker. Perhaps offer a 5 minute stretch break between sessions.

Learned a lot. Very clear and knowledgeable.

Program Evaluation

Effectiveness of Carla Grant:

5	4	3	2	1	0	Avg
7	2	0	0	0	0	4.8

Comments on Carla Grant:

I really enjoyed Carla's round table discussion approach to the plans. She really covered different levels of staff and field work and gave good examples and exercises that really were beneficial. I especially liked the discussion between attendees regarding different approaches to different sections of the audits.

Carla was good. Although she sat down for her parts, she was still very thorough in teaching those parts.

Really liked Carla's discussion-based teaching approach during the second day of class and enjoyed hearing what her firm and the other attendees' firms did for their EBP audits. Also appreciated her sharing some of the audit forms and specialized audit programs that Hungerford uses.

Carla was the exact opposite of Chris. She encouraged discussion about firm practices and I was able to bring back many of the topics of those discussions to my firm. She wasn't as knowledgeable about the subject matter as Chris, but the round-table discussion made up for that lack of knowledge.

she was great!

Great speaker! Did a good job of involving the students

I liked that she made it more of a discussion. It complimented Chris's style well.

Please describe any other observations or recommendations that you may have about the program

I think I would like to see more workpaper suggestions and approach to the audit suggestions. I think that workpaper examples from other firms was beneficial, it provides you with ideas and different approaches to test work.

It was one of the best training I have been to so far.

Need more short breaks or other ways to break up the sessions. Too much lecture format.

Overall, I thought the class was very informative. The class size was small which was helpful to discussion of different audit approaches. I really appreciated Windham Brannon and Hungerford sharing some of their audit forms with the rest of the class.

Allow for more round-table discussions or exercises during the course.

Number of months you have been in public accounting:

	<u># Responses</u>
12 - 24	3
25 - 36	3
36 - 48	1
Less than 12	1
Over 48	2

Opening Reception

Quality of Food/Service:

5	4	3	2	1	0	Avg
0	2	4	0	3	2	2.1

Facility:

5	4	3	2	1	0	Avg
2	5	1	0	1	1	3.1

Comments:

Great to meet everyone in a relaxed environment. The meal was ok, extremely salty chicken. Service was fine.

Appropriate for size of Group

I really enjoyed interacting with everyone and chatting. It may have been nice to have a choice in meats, but no real complaints with what was provided.

The food was not good.

No comments. It was fine. Good opportunity to meet everyone.

I liked the fact that we did not have a team activity. It was nice just to talk to people without being forced to participate in an activity.

I really enjoyed this. I would suggest that we introduce ourselves that night instead of in class the next morning.

Very nice setting, food was not good, service was good

It was unfortunate that only I and one other person hung out after the reception was over. Nothing like tax where everyone talked long after the reception was over.

Evaluation of Facility

Meeting Room

5	4	3	2	1	0	Avg
1	3	4	1	1	1	2.9

Sleeping Room

5	4	3	2	1	0	Avg
3	5	1	0	0	2	3.5

Group Meals

5	4	3	2	1	0	Avg
0	0	3	3	3	2	1.6

Refreshment breaks

5	4	3	2	1	0	Avg
0	2	4	2	1	2	2.3

Suggest ways to improve the administration of the program

Food was bad at the Red Lion.
 Dinner on Sunday night was the best meal even though the chicken was extremely salty. Lunch on Monday was Ceasar salad with poor quality chicken and very fishy tasting dressing. Lunch on Tuesday I had the sandwich. The bread was very hard, as soon as I looked at the ingredients in the sandwich the tomatoes on top were dried out and translucent, like they made the sandwich days before serving it. The meat on the sandwich had multi coloring to it, as if it were rotten meat. Needless to say I did not get past the first bite instead had rolls for lunch. The service from the waiter was always good, just the quality of food was very poor.

I dont know. The food was harmful!

Facilities were adequate though the meals at the hotel weren't the best. I do understand that costs were kept low which was part of the reason for this. Hotel rooms and facilities were very nice.

I understand the cost savings, but the meeting area, food, and refreshments were not ideal.

The meeting area was very cold at times, the highway traffic could be heard in the room, and there was not an adequate screen for the projector.

The food and refreshments were sub-par.

Sunday dinner - The chicken was over-salted, the rolls were very hard; the rice, asparagus, and dessert were fine.

Breakfast - okay, good variety. Although there was some confusion among Red Lion staff as to payment.

Monday lunch - Lettuce did not look fresh. Chicken and rolls were fine.

Tuesday lunch - Sandwich and pasta salad were okay. Dessert was not great and could have been left out of menu.

Refreshments - Not enough variety in beverages and snacks--soda options or chips would have been nice.

Accommodations - Okay. The bathrooms were dated and not very clean--there was dust on my countertop. There were no dining options within a comfortable walking distance.

Im sorry, but the place was dreadful from the very start. It took them an hour to get to the airport to get me. The toilets didnt flush, the food was horrible, the location right at the freeway was so loud I couldnt sleep. The town seemed a bit sketchy. The meeting room was FREEZING ,the chairs uncomfortable..Im soory but the only good thing i can think of was the coffe was good,

The room was very uncomfortable. I would suggest forming an arch shape with the tables and chairs instead of the position that the tables and chairs were in this time. That way, people don't have to crane their heads to look at the speaker.

Thought the course was very useful and informative, instructors kept me attentive

Have a group meal outside of the hotel on the Monday night. With a group this small, I don't think it would have been unrealistic for everyone to go into Denver that evening.