

Name: _____

Date: _____

ESOP MATCH

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| 1. Who manages the funds in your ESOP? | A. October |
| 2. What does ESOP stand for? | B. 3 Years |
| 3. When did JHF become an S-Corp? | C. True |
| 4. How much does JHF pay in taxes as an S-Corp? | D. 1984 |
| 5. What act offers legal protection for employee retirement benefits? | E. Mike Baugh |
| 6. What year were ESOPs approved by Congress? | F. Colleen Morgan |
| 7. What month is national ESOP month? | G. After 10 years |
| 8. True or False: ESOP companies have a lower turnover rate | H. Retirement |
| 9. True or False: ESOP companies are less profitable than other companies. | I. 2006 |
| 10. Who is one of the members of the ESOP Fiduciary Committee? | J. False |
| 11. Where can you find financial information about JHF? | K. 1974 |
| 12. Who is one co-trustee of the JHF ESOP? | L. ERISA |
| 13. What is one item that makes up your JHF ESOP? | M. Zero |
| 14. What year was the JHF ESOP established? | N. Moneta Group |
| 15. When do you have the diversification option of taking up to 25% of your ESOP and reinvesting it? | O. Employee Stock Ownership Plan |
| 16. How many years does an employee have to work at JHF to be 100% vested in their ESOP? | P. Rich Gau |
| 17. Name one time when employees receive the vested portions of their ESOP? | Q. Cash |