

Retirement Plan Design Study Request Form

In order to facilitate a retirement plan design study, please complete and supply this form and an employee census request form.

Legal Company Name	
Tax Structure of the Entity (C Corp, S Corp, Sole Proprietor, Partnership). If LLC, please indicate how entity is taxed	
Are there any companies with common ownership? If so, please provide ownership details and employee census for related company	
What is the desired total company contribution level amongst all retirement plans?	
Are there any particular goals? (i.e. specific contribution amount or individual(s) to maximize)	
Is there a 401(k) Plan in existence? If so, please provide a copy of last years valuation report or allocation showing contributions by participant and by source (401(k), match, profit sharing, etc.)	

Submitted by:

Name:	
Phone:	
Email:	



Employee Census Request

Company Name: _____

Please complete information for all employees employed during year.

Name	Gender M / F	Birth Date	Hire Date	Term. Date	Indicate Officer/ Owner %	Relationship to Owner (if any)	Total Gross W - 2 Compensation*	Total 401(k) Withholding	Hours Code**

*If applicable, enter Net Schedule C Income (for Sole Proprietor) or K - 1 Income (for Partners) instead of W - 2 compensation.

**Hours Code
 "0" if between 0 and 500 hours
 "1" if between 501 and 999 hours
 "2" if 1,000 or more hours