

Retirement Plan Proposal Request

Submitted by: _____

Company or individual's name (optional): _____

Type of plan desired: 401(k) Profit Sharing Defined Benefit Cash Balance Plan
 Other _____

Type of business: LLC Sole proprietor Partnership C corp. S corp.

How is the LLC taxed? Corporation Partnership

Business Inception Date: _____ Fiscal Year End: _____

Multiple Locations: No Yes (please indicate on [census](#))

Income reported for the Owner: Net Schedule C W-2 Partnership profits Sub S pass through

Do you or your spouse own other businesses?*: No Yes

Do your children, parents, or grandchildren own a business?*: No Yes

*If yes, complete a separate [census](#) for each.

Do you now, or have you in the past, had a Qualified Plan (check which type below)? No Yes

401(k) Profit Sharing Defined Benefit Money Purchase Cash Balance

Existing Plan Year End: _____

If you have a qualified plan, please provide the following information to assist us:

- ▶ Summary of Plan Provisions
- ▶ Most Recent Valuation

Do you have a SEP IRA or a Simple IRA – If so, what was the last year funded?: _____

What are the main objectives in opening the plan? (Check all that apply):

Increase Retirement Savings Maximize Deductions Minimize Staff Costs

Employee Recruitment/Retention Other _____

Ideally, how much would the employer like to contribute for: Owners _____

Staff _____

Please return, along with completed [Employee Census Form](#), to:

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