

Retirement Plan Fact Finder

Client Name	Corp. Entity					
Company	Prevailing Wage Employees					
Address	Leased Employees					
Phone	Current Investment Provider/Recordkeeper					
Email	Current TPA Firm					
EIN	Payroll Provider					
	Fiscal Yr End					
Do you or your spouse own any other businesses		Yes	No			
If Yes, explain						
Current Plan Type	SEP	SIMPLE	401(k)			
New Plan Type	401(k)	Profit Sharing	403(b)			
		Defined Benefit/Cash Balance	Defined Benefit/Cash Balance			
For Defined Benefit Plan	Desired Funding Amount					
Owner(s)/Officer(s) 3 Consecutive Years' highest compensation amounts						
	Year 1	\$	Year 2	\$	Year 3	\$

Census Request