

Retirement Plan Fact Finder

Company

Phone

EIN

Fiscal Yr End

Prevailing Wage Employees

Leased Employees

Current Investment Provider/Recordkeeper**Current TPA Firm**

Payroll Provider

Yes

No

If Yes, explain

Current Plan Type

SEP

SIMPLE

401(k)

Profit Sharing

403(b)

Defined Benefit/Cash Balance

New Plan Type

401(k)

Profit Sharing

403(b)

Defined Benefit/Cash Balance

Desired Funding Amount

Owner(s)/Officer(s) 3 Consecutive Years' highest compensation amounts

Year 1

\$

Year 2

\$

Year 3

\$

Census Request

[illegible]