

PROPOSAL QUESTIONNAIRE

It is extremely important that we receive accurate data on all employees of the company, including leased and part-time employees. It takes approximately 7-10 days for a proposal. The first one will be run at no cost.

Company Name _____

Plan Year End _____ Tax ID _____

Employer Fiscal Year End _____

Nature of Business _____

Business Structure:

- Corporation S Corp. Sole Proprietor
 Partnership Other _____

How many employees does the company have? _____

Does the company currently have a plan in place? Yes No

Does any owner of this company own a substantial portion (10% or more) of any other corporation, partnership, or sole proprietorship?

Yes No

If yes, please provide additional information such as the name of the other entity, the nature of business, percentage of ownership, number of employees, etc.

(This information is necessary for determining if a controlled group exists)

Goal of the Plan (who do you want to benefit and why is the employer considering a plan):

Do the key employees want a contribution of over \$50K? Yes No

Is company cash flow consistent? Yes No

How many years will the company have the plan for (minimum number) _____

Must the employer contribution be flexible? Yes No

If no, how much is the company willing to commit to annually? _____

Who is the person in your firm we should contact for more information?

Name: _____

Thank you for taking the time to complete this questionnaire in full. The information obtained here is extremely important to assure that we are able to run an accurate proposal.