

QUALIFIED/NON-QUALIFIED CENSUS REQUEST

Company Information

Name of Company/Business: _____

Client Name: _____

State: _____

Employee Turnover (circle one) High Low Variable

Type of Entity (circle one) Sole Proprietorship C-Corporation S-Corporation

LLC Taxed as a Corporation LLC Taxed as a Partnership

Non-Profit Organization Other _____

Date Business Commenced: _____

Is the business tax year from January 1 to December 1? ☐ Yes ☐ No

Do you have ownership in any other business(es)? _____

Determining what type of plan fits your business goals

Do you currently have a Qualified Plan? ☐ Yes ☐ No

If "Yes," please circle plan type: Profit Sharing 401(K) Defined Benefit SEP-IRA

Other: _____

Factors to consider Check all that apply

- ☐ My Business income is variable
- ☐ My Business income is constant
- ☐ I would like to have flexibility while making contributions
- ☐ I am comfortable making fixed contributions
- ☐ I would like to contribute \$50,000 or less for myself
- ☐ I would like to contribute \$50,000 or more for myself
- ☐ My total budget that I would contribute to the plan is \$100,000 or less
- ☐ My total budget that I would contribute to the plan is \$100,000 or more

I am interested in allowing employees to make before-tax contribution to the plan.

Besides yourself, is there anyone else you would like to favor?

Name and title: _____
