



Existing 401(k) Plan Review and Redesign

PensionSite.Org

P.O. Box 1869

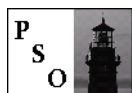
Winter Park, FL 32790-1869

Phone: 888-412-4120

Fax: 321-397-0409

Email: Bill@PensionSite.Org

www.PensionSite.Org



Is your client happy with their existing 401(k) plan?
Let us review the plan to see if it can be improved upon.

Gather the following information from your client:

- **Employee Census** – the form is attached and also available on our website www.pensionsite.org.
- A copy of the **Adoption Agreement** for the current plan.
- A copy of the most recent **Allocation Report**.
- A copy of the **Summary Plan Description (SPD)**, if available.

Once you have the information, send it to us for review, evaluation and redesign.

PensionSite.Org

CONFIDENTIAL SURVEY DATA

Post Office Box 1869
Winter Park, FL 32790-1869
888.412.4120
Fax 321.397.0409

Email: Bill@PensionSite.Org
www.PensionSite.Org

- Legal Name of Firm _____
Address _____
City _____ State _____ Zip _____
Phone: Area Code _____ Number _____
- Business Form: Corporation Partnership Sole Proprietorship
File as Sub Chapter "S" Corporation Yes No
- Date of Incorporation _____ Fiscal Year Ends _____
- Employee Breakdown (Number)
Salaried Employees _____
Hourly Employees _____ Union _____ Non-Union _____
Total Employees _____
- Corporate profit before Federal Income Tax for past two years:
20__ \$ _____ 20__ \$ _____
- Is Corporation contributing for employees to any deferred compensation plan now in operation? Yes No If yes, please complete the following:

	Amount of Last Annual Deposit	Voluntary Contributions	Total Trust Asset Value As of _____
Pension	\$ _____	\$ _____	\$ _____
Profit Sharing	\$ _____	\$ _____	\$ _____
- Are you contributing to Union Pension? Yes No
- Does this Firm itself, or any Stockholder, own at least 50% of any other Corporation, Partnership, or Proprietorship? Yes No
- Special Instructions _____

