

**\*\*\* EMPLOYER INFORMATION \*\*\***

**NAME OF COMPANY:** \_\_\_\_\_

**BUSINESS ADDRESS:** \_\_\_\_\_

\_\_\_\_\_

**MAILING ADDRESS (if different):** \_\_\_\_\_

\_\_\_\_\_

**E-MAIL ADDRESS OF PLAN CONTACT:** \_\_\_\_\_

**COUNTY/STATE OF PRINCIPAL BUSINESS ACTIVITY:** \_\_\_\_\_

**EMPLOYER'S TELEPHONE #:** \_\_\_\_\_ **FAX:** \_\_\_\_\_

**BOARD OF DIRECTORS:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**OFFICERS & TITLE(S):** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Name, Title & SSN of Officer/Owner signing documents:** \_\_\_\_\_

\_\_\_\_\_

**EMPLOYER'S FISCAL YEAR:** \_\_\_\_\_

**DATE OF INCORPORATION OR BUSINESS START UP:** \_\_\_\_\_

If incorporated, was business ever maintained as a sole proprietorship, partnership, or another corporation? \_\_\_\_\_

**FEDERAL EMPLOYER IDENTIFICATION NUMBER:** \_\_\_\_\_

**TRUST IDENTIFICATION NUMBER:** \_\_\_\_\_

**PLAN TRUSTEE(S), NAME OF CORPORATION OR INDIVIDUAL(S)?** \_\_\_\_\_

\_\_\_\_\_

**INVESTMENT BROKER'S NAME, FIRM, ADDRESS, EMAIL & TELEPHONE NUMBER:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Funds are invested with?** (i.e. John Hancock; American Funds; Fidelity, etc.) \_\_\_\_\_

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**ACCOUNTANT'S NAME, FIRM, ADDRESS, EMAIL & TELEPHONE NUMBER:**

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