

TIGER'S EYE BENEFITS CONSULTING

Retirement Plan Questions

The following questions are designed to gauge potential interest in, and objectives to be met relative to, the initiation of a retirement plan for employees.

Total number of employees _____

Employees who work more than 1,000 hours annually _____

Number of Company Owners _____

Number of Family Members of Owners working in the Business

Type of Business Entity (Corporation, Partnership, LLC, etc.)

Annual Budget for potential Employer contributions to a Retirement Plan

\$ _____

Annual Contribution Objective of Company Owner(s) \$ _____

Does the Employer have a preference as to how Company contributions are allocated to eligible employees –

Company match (to employee 401k) _____ Only? _____

Company profit sharing (allocated to any eligible employee)

Has the Business maintained any type of retirement plan for employees previously? _____

Does the Owner(s) of this Business have any ownership interest or involvement in any other enterprises or business entities? _____

If yes, please provide details _____

Please complete the attached Employee Census Form for a detailed analysis of retirement plan possibilities for your Business. Tiger's Eye Benefits Consulting appreciates the opportunity to be of service to you.

