

TIGER'S EYE BENEFITS CONSULTING

Retirement Plan Spec Sheet

Eligibility: _____

Entry: _____

Contributions: Pre-Tax 401k _____

Roth 401k _____

Discretionary Employer Match _____

Specified Formula Match _____

Discretionary Profit Sharing _____

Pro-Rata _____

Social Security Integrated _____

Age Weighted _____

Cross Tested _____

Safe Harbor – Match _____

Non-Elective _____

Rollovers – Employees _____

Participants Only _____

Vesting Schedule: 6-Year Graded _____

5-Year Graded _____

3-Year Cliff _____

Other _____

Plan Loans: _____

Hardship Withdrawals: _____

Plan Investments: Pooled _____

Participant Directed _____

Vendor Selected _____

Investment Contacts _____

Normal Retirement Age: _____

Early Retirement Age: _____

Disability: Social Security Eligibility _____

Disability Insurance Eligibility _____

Determined by Physician _____

Designated Plan Trustee(s): _____

