



## 2023 Retirement Plan Proposal Questionnaire

### FOR A ONE PERSON (OR HUSBAND AND WIFE) ENTITY

<b>Name of Entity:</b>	
<b>Type of Entity:</b>	<input type="checkbox"/> C Corp. <input type="checkbox"/> S Corp. <input type="checkbox"/> Sole Prop. <input type="checkbox"/> LLC taxed as a Partnership <input type="checkbox"/> LLC taxed as a Corporation <input type="checkbox"/> Single Member LLC
<b>Fiscal Year End:</b>	
<b>Existing Plan:</b>	<input type="checkbox"/> Nothing <input type="checkbox"/> SEP <input type="checkbox"/> Solo 401(k) <input type="checkbox"/> Other: _____
<b>Start Date of Entity:</b>	
<b>Desired Contribution:</b>	<input type="checkbox"/> Maximum Allowable   or <input type="checkbox"/> \$ _____
<b>Outside ownership:</b>	If either husband or wife have ownership in any other businesses, we will need to know the details of that ownership structure.

### CENSUS DATA:

Emp. #	Name	Birth Date	Hire Date	Ownership %	2020 Final Compensation (see notes)	2021 Final Compensation (see notes)	2022 Final Compensation (see notes)	Projected Annual Compensation for 2023 (see notes)	Part time? (less than 1,000 hours)	Indicate Relationship to Owner, if any
1										
2	Spouse on payroll?									

#### Compensation Notes:

- Please provide the three highest consecutive years of compensation into this entity. If those years were other than 2020, 2021 and 2022, please provide the details.
- For owners of S-Corporations, C-Corporations or LLC's taxed as corporations; use gross compensation from your payroll report.
- For self-employed individuals (sole-proprietorships, partnerships or LLC's taxed as sole proprietorships/partnerships), compensation is defined as Net Profit without reductions for plan contributions or self-employment tax.