

Please complete:

E. Type of Plan

A plan where the benefits are predetermined and funded over future years. (Often used where key personnel are older)

A plan where deposits are determined by a contribution formula and benefits depend on the values at retirement, (Often used where key personnel are younger)

A plan which is flexible and based on the profits of the company, where benefits depend on the values at retirement.

Other (Example: Target Benefit, 401(k)) _____

F. Type of Plan

Defined Benefit 412(i)
 Integrated Non-Integrated
(If integrated, this will favor higher paid employees)

Money Purchase
 Integrated Non-Integrated
(If integrated, this will favor higher paid employees)

Profit Sharing 401(k)
 Integrated Non-Integrate
(If integrated, this will favor higher paid employees)

If a 401(k) is requested, will there be matching contributions? Yes No

If yes, give formula _____

G. Proposed Eligibility Requirements

1. Class of employees to be included: All Salaried Hourly Union Members
 All Non Union Members Others

(If Union Members are to be excluded, they must have a pension plan or a negotiated contract.)

2. Service* _____ (Max. 2 years) Minimum Age _____ (No higher than 21)
*More than 1 year will require 100% vesting.

3. Normal Retirement Age: 65 65 and 5 years Other _____

H. Mandatory Employee Contributions: None Yes _____ % of annual earnings.

I. Additional Comments: _____

Submitting Agent: _____

**PROPOSAL CENSUS DATA
LISTING OF ALL EMPLOYEES**

First Name	Last Name	Sex M F	Birth Date M/D/Y	Hire Date M/D/Y	% Stock Owned	W 2 Compensation	Schedule C or K 1 Income	Annual Hours Worked If Part Time	Smoker Y=Yes N=No	Family Member of Owner Y or N	Position or Class
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*Part-time is defined as working less than 1000 hours during a twelve month period.

Employer's Signature _____ Date _____

Title _____