



Retirement Plan Basic Information Sheet

Name of Entity _____ Tax ID _____

Co. Address _____

Company Ph. # _____ Fax _____ Fiscal Year End _____

Type of Entity _____ (if an LLC, how is entity taxed?) _____ NAICS code _____

Other than this one, has company ever sponsored a retirement plan using this Tax ID? Yes _____ No _____

Ownership in other entities? Yes _____ No _____ Date of Incorporation _____

Trustee Name(s)/Title(s) _____

Trustee E-Mail _____ Ph. # _____

Trustee E-Mail _____ Ph. # _____

Plan Administrator Name _____ Ph. # _____

Plan Administrator's E-Mail _____

of Employees _____ What % of workforce is non-English speaking? _____

Payroll Provider _____ Ph# _____ Frequency _____

Payroll Contact _____ E-mail _____

Prior TPA Co. _____ TPA Contact _____

Prior TPA Contact Ph. # & email _____

Prior Recordkeeper _____ Acct. # _____

Prior Recordkeeper Contact _____ Ph. # _____

Prior Recordkeeper email: _____

Financial Advisor _____ Firm _____

Email _____ Phone _____