



## Retirement Plan Basic Information Sheet

Name of Entity \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Fax \_\_\_\_\_

Tax ID Number \_\_\_\_\_

Type of Entity \_\_\_\_\_ (if an LLC, how is the entity taxed?) \_\_\_\_\_

Ownership in other entities? \_\_\_ Yes \_\_\_ No Fiscal Year \_\_\_\_\_

Date of Incorporation \_\_\_\_\_

Trustee Name(s)/Title(s) \_\_\_\_\_

Trustee E-Mail \_\_\_\_\_

Plan Administrator Name \_\_\_\_\_

Plan Administrator's E-Mail \_\_\_\_\_

Prior Recordkeeper \_\_\_\_\_

Payroll Provider \_\_\_\_\_ Frequency \_\_\_\_\_

# of Employees \_\_\_\_\_

What % of workforce is non-English speaking? \_\_\_\_\_

Financial Advisor & Firm \_\_\_\_\_

FA's Phone & Email \_\_\_\_\_