

*Thank you for considering Pushkin & Pushkin, Inc. as your source for employee benefit plan management.
In order to customize a plan proposal for your business, please complete the following.*

Basic Information

Company name _____

Tax identification number (TIN) _____

Home office address _____

City _____

State _____

Zip _____

Contact name (1): _____

Contact name (2): _____

Title: _____

Title: _____

Phone: _____

Phone: _____

Email: _____

Email: _____

Number of employees: _____ Payroll Provider: _____

Does the company have multiple locations? Yes No

If so, list locations: _____

Type of business

Corporation

Partnership

Government agency

S-Corporation

Sole Proprietorship

Not for profit

What is your primary goal for your retirement plan?

Create a tax strategy for the business

Provide a benefit to employees

Enable business owners to maximize retirement savings

Other: _____

Attract and retain the best possible workforce

Basic Information (cont.)

How many owners and employees with at least 5% ownership are there at your company? _____

Are there any employees that you would like to exclude from participation?

None Union Part-time (works under 1,000 hours) Other _____

Ideally, who should be able to make contributions to the new plan:

Employer only Employees only through payroll deduction Both employer and employees

Do you want to offer a company match? Yes No

What types of investment options would you like to include in the plan menu: (check all that apply)

Target date funds Stable value investments
 Growth investments Annuities
 Growth-and-income investments Company stock
 Equity-income investments (other) _____
 Balanced investments (other) _____
 Bond/fixed income funds (other) _____
 Cash-equivalent investments

How would you prefer plan fees/expenses to be paid?

Costs covered by employer (can claim as tax deductions) Investment expenses to cover plan fees
 Costs spread among participant accounts (other) _____

How important are the following:

One point of contact for service and assistance Participant loan option
 Ability to work with a third-party administrator that specializes in recordkeeping and administration After-tax Roth contribution option
 Employee education Auto-enrollment/auto-escalation feature
 Fiduciary service feature

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