

Company Information Form

Please provide information on your firm below so we can prepare your plan documents and pre-complete other required documents.

Company Legal Name	
Street Address	
City, State, ZIP	
State of Incorporation	
EIN	
Executive contact (Typically firm owner(s), will also be plan Trustee) Include email address and phone / fax	
Administrative Contact and Email Address if not owner	
Date of Incorporation	
Type of Entity	
How is Entity taxed (S-Corp, C-Corp, etc.)	
Individual who will execute sale and formal plan documents if not Executive contact above	
If owners own any other companies, please provide Company Name, Address, EIN and percent owned	
If any family members of owners are employed by firm, provide name(s) and relationship(s)	