



Proposal Request

Referred by: _____

Today's date: _____

Date proposal needed: _____

(Please staple your business card here for our reference)

This is for a: new plan takeover plan

Client Profile:

Company Name: _____ Contact: _____

Phone: _____ Address: _____

Year company formed: _____ Fiscal year end: _____

Type of entity: C-Corp S-Corp Partnership Not-for-profit Sole Proprietor Other: _____

List owners, officers and ownership percentage:

Name:	%owned	Name	% owned
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

*(if any of the people above own an interest in another company, please indicated with an *)*

Does the employer currently have a plan? No Yes If yes, what type? _____

Additional comments: _____

Are they interested in a specific plan? No Yes specify: _____

Employer wishes to contribute approximately: \$ _____ per year.

The primary objective of the plan is: (rate by importance 1-4, with 1 as first priority)

___ tax deduction for owner ___ employee attraction and retention ___ employee incentive ___ creditor protection

Are there other concerns? Please explains: _____



ASSOCIATED
PENSION
CONSULTANTS

CONFIDENTIAL EMPLOYEE CENSUS

APC can provide this as an excel spreadsheet for your convenience.
This may be emailed/faxed back to us once completed.

Client Company Name _____

Employee Name (Last, First)	Date of Birth (mm/dd/yr)	Date Employed (mm/dd/yr)	Date of Termination (mm/dd/yr)	Company Officer	Family Member*	Pref. Employee**	Hours Worked		Annual Compensation	Estimated 401K Deferrals
							Under 1000	Over 1000		

*indicate owner's family members with a **S** for spouse, **C** for child, **M** for mother and **F** for father.

**Preferred employees are those for whom you wish to provide greater benefits.