Retirement Plan Census Worksheet

Employee Name (Initials)	Date of Birth	Date of Hire	Ownership Percentage	Relation to Owner	Compensation	Percentage or Amount Deferred to Current Plan

In order to allow us to prepare several alternative plan designs for your consideration, please complete this worksheet and the Retirement Plan Design Questionnaire. You can return it by email to wayne@waynefirebaugh.com or fax to 540-777-1631. If you have any questions, please do not hesitate to call us at 540-366-5800

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