

- 5) Please answer the following questions about the retirement plan your company currently offers.
- a. Please check all that apply

	NO PLAN		
	401(k)		SIMPLE IRA
	Profit-Sharing		Defined Benefit
	SEP		Money Purchase
	SARSEP		Target Benefit

If you checked “No Plan”, skip to question 6.

- b. Does your plan allow employee contributions? If so, approximately what percentage of eligible employees contribute their own money to the plan?
- c. Why are you considering a plan change?
- d. Are owners able to contribute the maximum amount allowed by law (2009 maximum is \$49,000 for defined contribution plans plus \$5,500 for employees age 50 and older)?
- 6) To enable us to design the best plan alternatives, please rank the following items. (1 to 4 with 1 being the highest)

	Contribution Flexibility
	Employer Contributions Subject to Vesting
	Minimum Contributions to Employees (Max to Owners)
	Maximum Tax Deduction

In order to allow us to prepare several alternative plan designs for your consideration, please complete this questionnaire and the Retirement Plan Census Worksheet. 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

