

Enterprise Pensions

Actuarial & Administrative Services

Information Needed to Prepare Retirement Plan Analysis

- Recent employer census information to date in Excel format (see attached listing).

Or

- Last year's Valuation Report, including last year's census information and non-discrimination testing.

- Rank the following statements, pertaining to the retirement plan, in order of importance:
 - ___ Contain the Company's contribution for the rank and file staff
 - ___ Give the employees the ability to save from their paychecks
 - ___ Create a focused benefit for certain non-owner employees
 - ___ Attraction of Quality Employees
 - ___ Exit Strategy for Shareholder(s)
 - ___ Retention of Key Employees
 - ___ Shareholder(s) Tax Shelter

- Do the Company's owners have any ownership interest in any other company? If so, what is the percentage?

- Has the Company ever had a prior Defined Benefit Pension Plan?

- Does the company lease employees?