

Plan Design Illustration Request Form

Complete and accurate employee census data and client information is required to complete a plan design illustration. Please provide requested information in an Excel file, if possible, or on this form. All data can be submitted via email to the address indicated below.

Date requested: _____ Date plan design illustration needed: _____

Name of Business/Entity: _____

Business Type: C-Corporation Professional Corporation Sub-S Corporation
 Proprietorship Partnership Government
 LLC Non-Profit/501(c)(3) Other _____

Plan year-end (month/day) _____ Entity-year end (month/day) _____

Provide requested census information for **all employees including owners**.

Employee Name (last, first)	Date of Birth	Date of Hire	Estimated Plan Year Compensation	Estimated Annual 401(k) Contributions	Estimated Hours Worked in 12 Months

LIST ALL COMPANY OWNERS	% OWNED

LIST ALL OFFICERS AND PROVIDE TITLES

LIST ALL FAMILY MEMBERS	PROVIDE RELATIONSHIP TO EMPLOYEE

Is the owner(s) in this business an owner in any other entity? Yes No

If Yes, we will contact you regarding additional information required.

Is it the client's intent to maximize contributions to the owners? Yes No

If No, please explain: _____

Are there specific plans you would like to see in the illustration? Check all that apply.

- Profit Sharing
- Simple IRA
- Cash Balance Plan
- 401(k) Profit Sharing
- Simple 401(k)
- Other (specify) _____
- Cross-Tested Profit Sharing
- Age-Weighted Profit Sharing

Does client currently have a qualified or nonqualified retirement plan? Yes No

If Yes, specify type of retirement plan _____

Please provide previous year's contribution allocation per participant if you would like those figures included in the plan illustration for comparison.

Person Requesting Analysis: _____

Address: _____

Phone: _____ Fax: _____ Email: _____

Please Submit Completed Plan Design Illustration Request Form To:
 Rehmann Financial
 Attn: Suzanne Burley
 39300 W Twelve Mile Road, Suite 100, Farmington Hills, MI 48331
 Phone: (248) 579-11520
 Fax: (248) 536-6201
 email: suzanne.burley@rehmann.com