

Dissinger Associates
Plan Administration & Design, Inc.
Pension Consultants, Actuaries & Administrators

RETIREMENT PLAN FEASIBILITY STUDY

Please provide the following information to help us prepare a study for you

1. Full legal name of business: _____

2. Form of Business:

<input type="checkbox"/> Sole Proprietor	<input type="checkbox"/> Partnership
<input type="checkbox"/> C Corporation	<input type="checkbox"/> S Corporation
<input type="checkbox"/> Professional Corp.	<input type="checkbox"/> LLC

3. Date business began operating: _____

4. Fiscal Year End: _____ / _____ / _____

5. Do you employ any Union members? Yes No

6. Employee Data: Please complete the Confidential Employee Data Sheet [If you have Union employees, and you contribute to the Union Plan, do **not** include the Union employees on the sheet]

7. Does any shareholder, Partner, the Sole Proprietor or their spouse own interest(s) in any other business? Yes No
 - o If yes, provide business name and % ownership

8. Identify the spouse, child or parent of any Owner or Partner on the employee data sheet:

9. Does the business currently sponsor any type of retirement plan? Yes No
If yes, type of plan and when effective: _____

10. What is your estimated budget for a contribution to a Plan? \$ _____

11. Which employee or employees do you want to receive the largest possible allocations of the contribution to the Plan? _____

