PENSION PROPOSAL FACT SHEET

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INTEGRATED PENSION DESIGN, INC.

225 MAIN STREET • SUITE 301 • NORTHPORT, NEW YORK 11768
TEL 631-261-6565 FAX 631-261-6566 OUTSIDE N.Y.1-800-842-0581

Contact Person: _____ Telephone:_____

Address: _____ Fax: _____

on behalf of _____ Contact:_____
(company)

Fiscal Year End: _____ Check one: ___Self-Emp'd ___C-Corp ___S-Corp

___Partnership ___LLP ___LLC

Employer ID #:_____

Any Other Companies Under Common Control? _____

Any Other Existing Pension Plans?_____

Approximate Target Contribution Desired: $_____

EMPLOYEE CENSUS INFORMATION
(including principals)

Name/Code	Sex	DOB	Date of Hire	Base Annual Comp. or Net Sched. C	Bonus or OT	% Owner	Union?	Title or Occupation Category	Worked 1000 Hours?