Request for
Pension Proposal

Name of Business_____
Tax Status: Incorporated_____ Unincorporated_____
Date business began_____
Date of Incorporation_____
Tax Year End_____
Approximate Contribution Desired %_____ or $ _____
(**indicate either percent of pay or dollar amount**)
Any current pension plan in force? Yes____ No____
(If so, supply details on a separate sheet.)
Do owners have ownership interests in any other firms? Yes____ No___
(If so, supply details on a separate sheet.)

Confidential Employee Census

Name	Date of Birth	Date of Hire	Salary	See note below and check if:			
				Part Time	Non Smoker	Ownership percentage	Officer

Note: "Part time" means that the employee works less than 1,000 hours per year. Check "Non-Smokers" if known.
List "Ownership Percentage" of all owners.