

Retirement Planning

Formal Pension Planning (Pension, Profit Sharing, 401(k), etc.)

Plan Description (Vesting, Qualifying, Contribution Formula, etc.)

Funding Participation

Employer Only

Employee Only

Employer & Employee (Formula)

Executive & Highly Compensated Employee Benefits

Non – Qualified Deferred Compensation

Executive Bonus Plan

Split Dollar Insurance

Benefit Financing

Others

Corporate Risk management

Key – Man Insurance (Life & Disability)

Business Continuation Insurance

Property & Casualty Insurance

Others

Payroll Deduction Plans:

Other Programs (Not mentioned):

BUSINESS SURVEY

Name:	Phone:
Address:	

Type of Entity

<input type="checkbox"/>	Sole Proprietorship
<input type="checkbox"/>	Partnership
<input type="checkbox"/>	Corporation
<input type="checkbox"/>	S Corporation
<input type="checkbox"/>	Limited Partnership
<input type="checkbox"/>	Other

Business Succession Planning

<input type="checkbox"/>	Buy & Sell Agreement
<input type="checkbox"/>	Stock Redemption Agreement
<input type="checkbox"/>	Entity Buyout
<input type="checkbox"/>	Cross Purchase
<input type="checkbox"/>	Estate Planning
<input type="checkbox"/>	Other
<input type="checkbox"/>	None

Funding

<input type="checkbox"/>	Life Insurance
<input type="checkbox"/>	Cash
<input type="checkbox"/>	Other
<input type="checkbox"/>	Unfunded

Benefits

<input type="checkbox"/>	Medical Coverage - Description:
<input type="checkbox"/>	Dental - Description:
<input type="checkbox"/>	Medical Reimbursement - Description:
<input type="checkbox"/>	Disability (Short -Term)
<input type="checkbox"/>	Disability (Long -Term)
<input type="checkbox"/>	Long -Term Care
<input type="checkbox"/>	Others