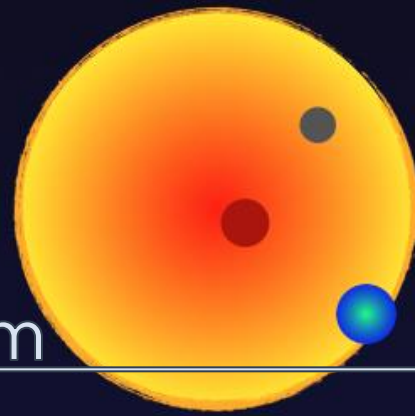


Third Stone Plans

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for Owner-Only Businesses
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Quik-Calc Data Request Form

Employer Information

Business Name _____

E-Mail Address _____

Entity Type C Corporation Partnership
 S Corporation Limited Liability Company
 Sole Proprietorship Limited Liability Company, S-election

Current Plans No Plan Cash Balance or Defined Benefit¹
 \$401(k) Profit Sharing¹ Cash Balance & \$401(k) Combination¹

¹Annual employer contribution rate as a percent of payroll: _____

¹Annual match rate as a percentage of \$401(k) deferrals (if applicable): _____

If you're unincorporated, enter your average annual net profit²: _____

²Expected gross profit less all expected expenses except qualified plan contributions

Does any owner or owner's relative own another business? No Yes (see pg. 2)

Owner Census

Owners	Related To? <i>e.g.: Spouse of O2</i>	Birth Date	Hire Date	Compensation History			
				This Year	Prior Year 1	Prior Year 2	Prior Year 3
1							
2							
3							
4							
5							

Related Employers

Related Employer Name:	Owner #1	%
EIN: _____ Business Entity Type: <input type="checkbox"/> C Corp. <input type="checkbox"/> S Corp. <input type="checkbox"/> LLC/LLP <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Prop. <input type="checkbox"/> LLC/LLP (S)	Owner #2	%
	Owner #3	%
	Owner #4	%
	Describe the relationship between this entity and the other Employers listed:	
Related Employer Name:	Owner #1	%
EIN: _____ Business Entity Type: <input type="checkbox"/> C Corp. <input type="checkbox"/> S Corp. <input type="checkbox"/> LLC/LLP <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Prop. <input type="checkbox"/> LLC/LLP (S)	Owner #2	%
	Owner #3	%
	Owner #4	%
	Describe the relationship between this entity and the other Employers listed:	
Related Employer Name:	Owner #1	%
EIN: _____ Business Entity Type: <input type="checkbox"/> C Corp. <input type="checkbox"/> S Corp. <input type="checkbox"/> LLC/LLP <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Prop. <input type="checkbox"/> LLC/LLP (S)	Owner #2	%
	Owner #3	%
	Owner #4	%
	Describe the relationship between this entity and the other Employers listed:	