Compare retirement plans for your business

Use this sheet to prepare a conversation with your appropriately qualified professionals. Write down the decision you want to make and what information is still missing.

01 Which employees and related businesses must be included in this analysis?

02 What is the complete cost under normal, weaker and stronger business years?

03 Which responsibilities remain with the company after we hire each provider?

04 How would hiring, an acquisition or an ownership transition change the design?

05 How will we review whether the plan remains suitable for employees and the owner?

LEAVE WITH AN AGREED NEXT STEP

Decision / information needed: _____

Person responsible: _____ Review date: _____

General education only. This is not individualized investment, tax, legal or insurance advice. No advisor relationship or introduction is created by using this sheet. Confirm the scope and responsibilities with each professional.