



Retirement Income and Estate Planning Services offered through
Plancorr Wealth Management, LLC Registered Investment Advisor.

Small Business Owner Profile

Name of Business _____

Type of business _____

Business Address _____

Business owner name: _____

Tele: _____

Email: _____

H.R. /Payroll contact person: _____

Tele: _____

Email: _____

Number of Employees _____

401(k) Plan Yes__ No__

Employer contributes to 401(k) plan Yes__ No__

Employer matches 100% of the first ___% of an employee's salary, and then contributes another ___% on the next
___ % of employee salary

Current 401(k) account balance \$ _____