



Executive Benefits Plan Design Questionnaire

(In an ideal world which item(s) is/are most important?)

Employer

- | | |
|---|--------------------------|
| 1. Current Deduction? | <input type="checkbox"/> |
| 2. Current Employee Deferral? | <input type="checkbox"/> |
| 3. Retention of the Employee (Golden Handcuff)? | <input type="checkbox"/> |
| a. Flexible Vesting Schedule per employee | <input type="checkbox"/> |
| b. Stock like Structure? | <input type="checkbox"/> |
| c. 401K Look Alike? | <input type="checkbox"/> |
| 4. Tax Deductible Benefit Payable at Retirement | <input type="checkbox"/> |
| 5. Complete executive control over the asset? | <input type="checkbox"/> |
| 6. Flexibility of the plan design by participant? | <input type="checkbox"/> |
| 7. Matched asset against a deferred benefit | <input type="checkbox"/> |
| 8. Key Man Insurance | <input type="checkbox"/> |
| 9. Cost Recovery of a Benefit Plan | <input type="checkbox"/> |

Employee

- | | |
|---|--------------------------|
| 1. Current Deduction (i.e. like 401K)? | <input type="checkbox"/> |
| 2. No Limit to retirement contribution? | <input type="checkbox"/> |
| 3. Tax Deferred Growth? | <input type="checkbox"/> |
| 4. Tax Free Income at Retirement? | <input type="checkbox"/> |
| 5. Tax Free Death Benefit? | <input type="checkbox"/> |
| 6. Access to Cash during Employment? | <input type="checkbox"/> |