



Executive Benefits Plan Design Questionnaire

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

Employer

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

Employee

1. Current Deduction (i.e. like 401K)?
2. No Limit to retirement contribution?
3. Tax Deferred Growth?
4. Tax Free Income at Retirement?
5. Tax Free Death Benefit?
6. Access to Cash during Employment?