



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? ☐

Schiff Executive Benefits, LLC
51 Camellia Ct.
Newtown, PA 18940
(610) 292-9330
(610) 292-9335
info@SchiffBenefits.com