



Hunter Benefits Consulting Group, Inc.

HUNTER BENEFITS

Must fill out this form in PDF editor ([Adobe Reader](#), [Apple Preview](#), [Microsoft Edge](#))

Hunter Benefits Consulting Group, Inc. (HBCG) specializes in providing cost effective comprehensive consulting and administrative services for a variety of employee benefit plans. **HBCG** was founded on the belief that the client's primary concern is accurate reporting generated on a timely basis for a reasonable fee. Whether you are looking to establish a straightforward 401(k) plan or a sophisticated Defined Benefit plan, **HBCG** is committed to assisting small- and medium-sized businesses in navigating the various obstacles of IRS and DOL compliance.

Because **HBCG** is an independent Third Party Administrator (TPA), we are able to coordinate with a wide variety of funding methods. Many of our clients maintain their assets at some of the largest mutual fund and insurance providers, while other clients maintain individual brokerage accounts.

HBCG administers over 1,000 retirement plans throughout the United States. As a national TPA we are able to provide services for the following types of plans:

- Defined Contribution Plans, such as:
 - ✓ 401(k) Plans
 - ✓ Profit Sharing Plans
 - ✓ Money Purchase Plans
 - ✓ 403(b) Plans
 - ✓ 457 Plans
 - ✓ 401(a) Retirement Plans
- Defined Benefit Pension Plans, such as:
 - ✓ Traditional
 - ✓ Cash Balance

Furthermore, the wide scope of experience provided by our staff allows **HBCG** to provide the following services:

- Plan design
- Prepare and maintain Plan documents, including mandatory Amendment & Restatements
- All aspects of compliance testing
- Form 5500 with schedules
- Employer contribution allocation
- Employee notice preparation and support
- Plan merger, acquisition and spin-off services
- Full service plan termination support
- Actuarial valuation
- Corrective programs for late filings
- Corrective programs for late deposits

Thank you for considering **HBCG** as your source for employee benefit plan administration.



Retirement Plan Proposal Questionnaire

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In order to maximize your plan options, please fill out the following information:

COMPANY INFORMATION

Company Name		Contact Person		
Street		City	State	Zip
Phone Number	Fax Number	Email Address		
Type of Entity:	Corporation	S Corporation	Partnership	
	LLC	LLP	Sole Proprietorship	Other
Fiscal Year:		Date Incorporated :		
Number of Eligible Participants:		New or Take Over Plan?	<input checked="" type="checkbox"/> New Plan	Existing Plan
Existing Assets: \$		Who holds the assets?		

PLAN INFORMATION

Are the owners of this company part owners in any other business?	Yes	No
Does the company have an existing plan?	Yes	No
If yes, what type of plan is it?	Profit Sharing	Money Purchase
	Defined Benefit	Other
Does the Company want to:		
Maximize the amount contributed on behalf of the Highly Compensated employees?	Yes	No
Minimize the amount contributed on behalf of the rank and file employees?	Yes	No
Approximate Target amount of Contribution (if known):	\$	

PRIOR PLAN INFORMATION

Has the Company ever had a prior plan that is now terminated?	Yes	No
If Yes, what type of plan was it?	SEP or SAR-SEP	Defined Benefit
	Simple IRA	
	Defined Contribution (e.g. Profit Sharing, Money Purchase, 401(k), ESOP, etc.)	

SPECIFIC GOALS

Any other specific goals?



Confidential Census

Complete this Form in Excel (or in Google Sheets if you don't have Excel) then upload to our secure location as directed below.

Excel Directions

- Open [Excel template](#).
- When link is clicked, template will auto download
- When finished filling out form, save (company name questionnaire).
- After saved, go [here](#) to upload this finished PDF and finished Excel sheet to our secure location.

OR

Google Sheets Directions

- Open [Google Sheets template](#).
- Go to File, Make a Copy, Make a Copy (If you skip this step it is view only).
- When finished, go to File, Download, and Download as "xlsx" file.
- After downloaded and finished, save with company name. Go [here](#) to upload this finished PDF and finished Google sheet to our secure location.