

403B INTAKE QUESTIONNAIRE

1 CONTACT INFORMATION

EMPLOYER	NAME OF EMPLOYER		CONTACT/ADMINISTRATOR PERSON'S NAME (First, Last)	
	ADDRESS		CITY,	STATE ZIP
	DAYTIME PHONE NUMBER	CONTACT PERSON'S EMAIL		
	NAME OF PLAN		EMPLOYER TAX ID	NUMBER OF EMPLOYEES

FORMER CONTACT IF APPLICABLE.	FORMER RECORD KEEPER'S NAME	FORMER RECORD KEEPER'S PHONE NUMBER
	FORMER TRUSTEE'S NAME	FORMER TRUSTEE'S PHONE NUMBER

FINANCIAL REPRESENTATIVE IF APPLICABLE.	REPRESENTATIVE'S NAME	REPRESENTATIVE'S PHONE NUMBER
	BROKER/DEALER NAME	REPRESENTATIVE'S EMAIL

2 GENERAL QUESTIONS

ORGANIZATIONAL STRUCTURE:

- ☐ 501(c)3 church ☐ ministry/non-profit , or ☐ other: _____
☐ Request a tax exempt letter from the IRS

STATUS OF PLAN:

- ☐ new plan
☐ restatement
☐ Request required prior plan documents (including any amendments) for review
☐ start date: ____/____/____ ☐ calendar, or ☐ fiscal year
☐ ERISA ☐ Non-ERISA

TYPE OF PLAN:

- ☐ church plan ☐ church-controlled organization (ie: school or daycare) ☐ non-church controlled ministry

HOUSING ALLOWANCE:

- ☐ no ☐ yes

COMPENSATION:

- ☐ W2 ☐ bonuses ☐ other: _____

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THE MASTER'S PLAN

THIS IS NOT INTENDED TO BE ERISA, TAX, LEGAL OR INVESTMENT ADVICE. IF YOU ARE SEEKING INVESTMENT ADVICE SPECIFIC TO YOUR NEEDS, SUCH ADVICE SERVICES MUST BE OBTAINED ON YOUR OWN, SEPARATE FROM THIS INFORMATION. THE MASTER'S PLAN IS A SERVICE DIVISION OF TIMOTHY PARTNERS, LTD., MEMBER FINRA.

BEFORE INVESTING IN ANY MUTUAL FUND, CONSIDER THE FUNDS' INVESTMENT OBJECTIVES, RISKS, CHARGES AND EXPENSES. CONTACT YOUR FINANCIAL PROFESSIONAL FOR A PROSPECTUS CONTAINING THIS INFORMATION. PLEASE READ IT CAREFULLY. TIMOTHY PLAN IS DISTRIBUTED BY TIMOTHY PARTNERS, LTD., MEMBER FINRA.

3 ADOPTION AGREEMENT INFORMATION

ELIGIBILITY:

☐ immediate, or ☐ other: _____

MINIMUM AGE LIMIT:

☐ _____ (default is 21)

EXCLUDED EMPLOYEES:

☐ non-resident aliens ☐ other: _____

TYPES OF CONTRIBUTIONS ALLOWED IN THE PLAN:

☐ employee deferrals ☐ employer match ☐ employer contributions

AMOUNT OF CONTRIBUTIONS ALLOWED IN THE PLAN:

☐ _____% ☐ discretionary \$ _____

VESTING SCHEDULE:

☐ immediate vesting
☐ cliff (elaborate: _____)
☐ graded (elaborate: _____)

INVESTING OPTIONS:

☐ pre-tax traditional ☐ roth ☐ pre-tax and roth

HIGHLY COMPENSATED EMPLOYEES?

☐ no ☐ yes

QNEC MONEY?

☐ no ☐ yes

WILL PLAN ACCEPT PLAN ROLLOVERS?

☐ no ☐ yes

WILL PLAN ACCEPT TRANSFERS?

☐ no ☐ yes

4 PLAN PROVISIONS - WITHDRAWALS

WHAT TYPE OF WITHDRAWALS WILL PLAN SPONSOR OFFER:

☐ 59 ½ in-service withdrawals
☐ Hardship withdrawals

LOANS ARE NOT OFFERED AT THIS TIME.

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THE MASTER'S PLAN

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