



## Single K Retirement Plan Review Packet

---

For more information on our services, proposals and fee quotes, please contact us or visit our website.  
[www.NBSbenefits.com](http://www.NBSbenefits.com)

**Eric Thorne**  
**VP of Business Development**  
(800) 274-0503 ext 118  
(801) 303-2634 (Fax)  
[erict@NBSbenefits.com](mailto:erict@NBSbenefits.com)

**Kim Stephens**  
**Senior Consultant**  
(800) 274-0503 ext 119  
(801) 303-2632 (Fax)  
[kims@NBSbenefits.com](mailto:kims@NBSbenefits.com)

- Plan design consultation
- Preparation of plan documents
- Compliance testing
- Completion of annual Form 5500 and all related schedules
- Summary Annual Report
- Administrative support for plan sponsors and fiduciaries
- Assistance in ongoing compliance with pension law
- Website Q&A, forms, presentations, etc

# New Retirement Plan Information (Single K)



## 1 Plan Sponsor

Employer Name \_\_\_\_\_ Employer Identification Number (EIN) \_\_\_\_\_

Employer Physical Address, \_\_\_\_\_ City, State, Zip Code \_\_\_\_\_

Contact Person(s) \_\_\_\_\_

Phone Number \_\_\_\_\_ Fax Number \_\_\_\_\_ Email Address \_\_\_\_\_

Legal Plan Name \_\_\_\_\_  Yes (if yes, please provide a copy)  No  
Do you maintain any other Retirement Plans?

Trustee(s) including email addresses \_\_\_\_\_ IRS Plan Number \_\_\_\_\_

Fiscal Year End \_\_\_\_\_ Plan Year End \_\_\_\_\_ Original Effective Date \_\_\_\_\_

C-Corp  S-Corp  Partnership  Sole Proprietor  LLC (Corporation)  LLC (S-Corp)  LLC (Partnership)  Other:

Employer Entity Type \_\_\_\_\_

## 2 Service Providers

Name Of Investment Advisor \_\_\_\_\_ Advisor Firm \_\_\_\_\_

Advisor Phone \_\_\_\_\_ Fax Number \_\_\_\_\_ Email Address \_\_\_\_\_

CPA Name \_\_\_\_\_ Phone Number \_\_\_\_\_ Email Address \_\_\_\_\_

Attorney Name \_\_\_\_\_ Phone Number \_\_\_\_\_ Email Address \_\_\_\_\_

Payroll Provider \_\_\_\_\_ Phone Number \_\_\_\_\_ Email Address \_\_\_\_\_