

Census Data

Plan Name: _____

Please be sure to include all employees who worked for you during the plan year. The Employee Contributions and Employer Match columns only apply to 401(k) Plans. **Social Security numbers are extremely important.** If an employee has been re-hired, please list his original hire date and re-hire date. Generally Compensation is provided for your company fiscal year, which is generally the same as your plan year. Call us at (602) 957-7101 if you are not certain which period of compensation to provide. Regardless of the compensation period, hours **must be** reported based on Plan Year.

For Sole Proprietor or Partners, please provide a copy of your “Schedule C” or “Schedule K-1” and page 1 of Form 1040 and Schedule SE when available.

Employee Name	Gender M / F	Social Security No.	Compensation For the Period __/__/__ to __/__/__	Date of Birth	Date of Hire	Date of Term. (if applicable)	Hours* (see code chart below)	Employee Contribution	Employer Match (if applicable)	Officer Ownership % / Family Member?

*Hours Codes: *Hours should be reported on a Plan Year basis	A = 1,000+	B = 501 – 999	C = <500
--	------------	---------------	----------

The information outlined above is a complete and accurate census covering all employees for the above plan year end.

Signature _____ Print Name _____ Date _____