



California Dentists' Guild Questionnaire / Census

Preferred Mailing Address: Business Residence

Name: _____ Company Name: _____

Office Address: _____

Office Phone: _____ Office Fax: _____

Home Address: _____

Home Phone: _____ E-mail: _____

What is the best time to contact you? _____

Best Location: Home or Business? _____ Fiscal Year End: _____

Sole Proprietor Partnership Corporation S-Corp LLC LLP

All Information Supplied is Confidential and is ONLY used to Determine Plan Design.

Do you have a Desired Annual Contribution Amount? _____ If so, what is the Desired Amount? _____

Would you like to Maximize your Contribution? Y

Plan Objective: _____

Existing Plans: DB MP PS-Tested Simple Active Inactive
 401(k) – ADP Tested 401(k) Safe Harbor SH Non-elective SH Match

Other Businesses Owned by Dentist or Spouse: _____

If any of the Dentist/Employees listed below are family members indicate relationship: _____

*Note: Please complete this census and submit to California Dentists' Guild for a no cost analysis.



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Employee	Position**	Percent Owned	Date of Birth	Date of Hire	Annual* Compensation	Does Employee work 1,000 hrs/yr?	
Dr.						[] Y [] N	[] Yes, in a prior year
						[] Y [] N	[] Yes, in a prior year
						[] Y [] N	[] Yes, in a prior year
						[] Y [] N	[] Yes, in a prior year
						[] Y [] N	[] Yes, in a prior year
						[] Y [] N	[] Yes, in a prior year
						[] Y [] N	[] Yes, in a prior year
						[] Y [] N	[] Yes, in a prior year
						[] Y [] N	[] Yes, in a prior year
						[] Y [] N	[] Yes, in a prior year
						[] Y [] N	[] Yes, in a prior year

***COMPENSATION:**

- 1) Sole Proprietor – Owners: Bottom line Schedule C Income Before Deduction for Employee Contribution
Employees: Plan Year W-2 Compensation
- 2) Corporation (C & sub S) – All Employees: Plan Year W-2 Compensation
- 3) Partnership – Partners: Earned Income Including Guarantee Payments
Employees: Plan Year W-2 Compensation

****Position:**

Options: Dentist (owners), Dentist (non owners), Front Office, Back Office, Dental Hygienists, Dental Assistants, Partners