



# Executive Benefits Plan Design Questionnaire

(In an ideal world which item(s) is/are most important?)

## Employer

- 1. Current Deduction?
- 2. Current Employee Deferral?
- 3. Retention of the Employee (Golden Handcuff)? 
  - a. Flexible Vesting Schedule per employee
  - b. Stock like Structure?
  - c. 401K Look Alike?
- 4. Tax Deductible Benefit Payable at Retirement
- 5. Complete executive control over the asset?
- 6. Flexibility of the plan design by participant?
- 7. Matched asset against a deferred benefit
- 8. Key Man Insurance
- 9. Cost Recovery of a Benefit Plan

## Employee

- 1. Current Deduction (i.e. like 401K)?
- 2. No Limit to retirement contribution?
- 3. Tax Deferred Growth?
- 4. Tax Free Income at Retirement?
- 5. Tax Free Death Benefit?
- 6. Access to Cash during Employment?

Securities Offered through MML Investors Services, LLC.

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