

Company Name: \_\_\_\_\_

**CENSUS REQUEST**

PLAN YEAR END: \_\_\_\_\_

Instructions:

- 1) Complete census data for **all** employees who worked at any time during the plan's fiscal year.
- 2) Compensation should include: Basic + overtime + bonus + etc., as specified in your Plan document.
- 3) When applicable, complete the Status Code and Date
- 4) If you prefer, you may submit your own computer generated census which includes all the following information.

Employee Data							Hours Worked			For 401(k) Plans		Status Code*	
Name	SS#	Sex	% Owner	Birth Date	Hire Date	Compensation	< 500	500-1000	> 1000	Deferrals	Match	Code	Date
_____	_____	_____	_____	____/____/____	____/____/____	\$ _____	_____	_____	_____	\$ _____	\$ _____	(____)	____/____/____
_____	_____	_____	_____	____/____/____	____/____/____	\$ _____	_____	_____	_____	\$ _____	\$ _____	(____)	____/____/____
_____	_____	_____	_____	____/____/____	____/____/____	\$ _____	_____	_____	_____	\$ _____	\$ _____	(____)	____/____/____
_____	_____	_____	_____	____/____/____	____/____/____	\$ _____	_____	_____	_____	\$ _____	\$ _____	(____)	____/____/____
_____	_____	_____	_____	____/____/____	____/____/____	\$ _____	_____	_____	_____	\$ _____	\$ _____	(____)	____/____/____
_____	_____	_____	_____	____/____/____	____/____/____	\$ _____	_____	_____	_____	\$ _____	\$ _____	(____)	____/____/____
_____	_____	_____	_____	____/____/____	____/____/____	\$ _____	_____	_____	_____	\$ _____	\$ _____	(____)	____/____/____
_____	_____	_____	_____	____/____/____	____/____/____	\$ _____	_____	_____	_____	\$ _____	\$ _____	(____)	____/____/____
_____	_____	_____	_____	____/____/____	____/____/____	\$ _____	_____	_____	_____	\$ _____	\$ _____	(____)	____/____/____
_____	_____	_____	_____	____/____/____	____/____/____	\$ _____	_____	_____	_____	\$ _____	\$ _____	(____)	____/____/____
_____	_____	_____	_____	____/____/____	____/____/____	\$ _____	_____	_____	_____	\$ _____	\$ _____	(____)	____/____/____
_____	_____	_____	_____	____/____/____	____/____/____	\$ _____	_____	_____	_____	\$ _____	\$ _____	(____)	____/____/____
_____	_____	_____	_____	____/____/____	____/____/____	\$ _____	_____	_____	_____	\$ _____	\$ _____	(____)	____/____/____
_____	_____	_____	_____	____/____/____	____/____/____	\$ _____	_____	_____	_____	\$ _____	\$ _____	(____)	____/____/____

- \* Status Codes
- (E) Employee is a union member subject to collective bargaining
  - (K) Employee elects out of Plan
  - (L) Employee elects not to make mandatory contributions
  - (M) Employee is in another Plan which precludes participation in this Plan
  - (N) Employee has died, indicate date
  - (P) Employee is disabled, indicate date
  - (R) Employee has entered normal retirement, indicate date

- (S) Employee has elected early retirement, indicate date
- (T) Employee has terminated, indicate date
- (W) Employee has elected postponed retirement, indicate date
- (X) Employee on approved leave of absence, indicate date
- (Y) Employee rehired, indicate date
- (Z) Employee is terminated and fully paid out, indicate date

