

NQDC Executive Benefits Questionnaire

Nonqualified executive benefit plans can help your company retain key management and provide an opportunity for executives to increase the amount of compensation they are able to defer.

If you would like to learn more about the nonqualified executive benefit solutions offered through Bank of America Merrill Lynch, complete the following information and return this form to your Merrill Lynch financial advisor.

Are your firm's key employees concerned about having enough income from Social Security benefits and qualified plans to retire comfortably? Yes No

Are ACP/ADP testing issues limiting contributions for your key employees? Yes No

Does your firm have any other qualified retirement plans where any of your key employees receive proportionally less or no benefits as compared to other employees? Yes No

Is your firm concerned about recruiting, retaining and rewarding high-performing key employees? Yes No

Is your firm interested in using special incentives to tie your key employees to the firm for the long term? Yes No

Would your key employees be interested in deferring more compensation? Yes No

Company name: _____ Industry: _____ Total employees: _____

Company contact: _____ Phone: _____

Business structure: C Corp S Corp LLC Partnership Tax Exempt

Number of business owners: Publicly traded 1 2 3 4+

Years in business: Less than 3 3-5 6-9 10-20 20+

Company tax rate (or owner's tax rate if S Corp, sole proprietorship, etc.): _____%

Number of key employees to be included in a program: _____

Total estimated annual contributions: _____

Contributions to this plan will come from: Participants Employer Participants and employer

Interested in: Retirement savings In-service distributions Executive incentives Employee retention
 Performance rewards All of the above

For plan sponsor use only.

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Investment products:

Are Not FDIC Insured	Are Not Bank Guaranteed	May Lose Value
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