



Client 1 Work and Income

Position/Title: _____

Business Name: CLARK NEXSEN

Business Address: 4507 MAIN ST., SUITE 1400

City: VA BEACH State: VA ZIP: 23402

Years with Company: 20 Base Salary: 212,000 Bonus: 75,000

Are you contributing to your 401(k) Plan? Yes No

Current Balance*: 500,000 Annual Contribution: VARIES

Does the Company Match? Yes No If Yes, How Much? (%) 6%

Is there a Profit Sharing Component? Yes No If Yes, How Much? _____

Do you have any Deferred Compensation? Yes No If Yes, How Much? COL PLAN

How much Deferred Compensation are You Setting Aside Each Year? _____

Do you have any Stock or Ownership in Your Company? Yes No If Yes, How Much? \$1.6M

Anticipated Retirement Date: UNKNOWN

If you have any other business-related income, please provide details below:

***Please provide a copy of your most recent 401(k) and Deferred Compensation Statements**