



Split Dollar Plan Opportunity Assessment Questionnaire

Organization Information

Is the organization tax-exempt? Yes No

If yes, type of tax-exempt organization:

Private (e.g., 501(c)(3)) Governmental

Organization's primary sector:

Healthcare (e.g., hospitals, health systems) Academic/University

Religious Organization Credit Union

Other (Please specify): _____

Current Compensation Programs

Does the organization currently offer any deferred compensation programs? Yes No

If yes, please indicate which type(s) apply:

403(b) 457(b)
457(f) Other (Please specify): _____

Who funds the current deferred compensation programs?

Employer-paid Employee voluntary contributions
Both

Are there limitations or challenges with current compensation programs that make it difficult to recruit and retain top executives? Yes No

If yes, please describe:



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Key Leadership Structure

What is the typical compensation level for key leadership or highly compensated employees (e.g., C-suite executives, top physicians)?

Less than \$500,000

\$500,000 - \$1M

More than \$1M

Does the organization face challenges in offering competitive compensation compared to for-profit organizations?

Yes

No

If yes, please describe:

Retirement and Retention Strategy

Does the organization have a formal retention plan in place for key executives?

Yes

No

What percentage of key executives are expected to retire in the next 5-10 years?

Less than 25%

25-50%

More than 50%

Interest in Split Dollar Approach

Has the organization considered using Split Dollar Life Insurance plans as part of its compensation strategy?

Unsure

Yes

No

Would the organization be interested in exploring flexible, tax-advantaged compensation options to help retain and attract top talent?

Yes

No

Any additional comments or concerns regarding executive compensation or benefits?

If interested in learning more about the CAP program, please contact Michael and Chris

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