



Request for Proposal

1 Company Information:		Submitted By:			
		Submitter's E-Mail:			
		Company:			
		Address 1:			
		Address 2:			
		City/State/Zip:			
		Contact Phone:			
Business Type: <i>(Circle One)</i>	Sole Proprietor	Regular Corporation			
	Partnership	S Corporation			
	Limited Liability Partnership	Limited Liability Company			
	<i>taxed as:</i> SP P Corp S Corp	<i>taxed as:</i> SP P Corp S Corp			
Plan Type <i>(Circle One)</i> :	401(k)	Solo K	PS		
	MP	ESOP	DB		
	457	Other:	_____		
Number of eligible participants:					
2 Broker Information:		Contact Name:			
		Company:			
		Address 1:			
		Address 2:			
		City/State/Zip:			
		Phone #:			
		Fax:			
		E-mail:			
3 For New Cases Only:		New Funding Vehicle:			
	Product Type <i>(Circle One)</i> :	Individual Accounts	Pooled Accounts		
4 For Takeover Cases Only:		Where are the present assets?			
		Where will the assets be transferring to (if applicable)?			
	Product Type <i>(Circle One)</i> :	Individual Accounts	Pooled Accounts		
5 Does the plan have a loan and/or hardship provision?		Loans: Yes No		Hardships: Yes No	
6 Where should the proposal be sent?					
Company:	By Mail				
	By Fax	Fax #:			
	By E-mail				
Broker:	By Mail				
	By Fax				
	By Email				