

Proposal Request Form

A member of Western & Southern Financial Group

Please complete all information and return (1) Proposal Request Form and (2) Census to Proposal-Request@llic.com. Requests and Census documents without complete information will not be able to be processed.

GENERAL INFORMATION		
EMPLOYER NAME		
HOW IS THE COMPANY TAXED?		
Corporation (C-corp or S-corp) Partnership Sole Proprietor		
What is the tax year for the proposal?		
What is the budget for contributions? \$ (if blank we will illustrate maximum)		
PLAN DESIGN:		
Please check desired plan type, if known:		
412(e)(3) Fully Insured Defined Benefit 401(k) Profit Sharing Cash Balance	Unkno	wn
ADDITIONAL INFORMATION		
Other Retirement Plans		
Does the Employer currently sponsor a qualified retirement plan?	Yes	□No
If yes, what kind of plan:		
Note: If there is an existing 401(k)/Profit Sharing plan, please provide a copy of the Adoption Agree Proposal cannot be started without review of documentation.	ment.	
Has the Employer ever previously sponsored a retirement plan?	Yes	☐ No
If yes, provide the termination date: Type of plan:		
Controlled Group		
Does the owner(s) have ownership in any other businesses?	Yes	☐ No
If yes, is the Employer part of a controlled group or affiliated service group?	Yes	☐ No
Note: Employer's CPA or attorney can provide this info.		

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EMPLOYER CENSUS

Please submit completed Excel census in electronic format. Sample census available at: https://agent.llic.com/ProductsAndServices/RetirementServices/FormsAndReferenceMaterials

AGENT INFORMATION
Lafayette Life Affiliation (check one):
Contracted Agent Uncontracted Agent MO Other
AGENT/AGENCY NAME
TELEPHONE NUMBER EMAIL ADDRESS
NOTES
Please email (a) proposal request, (b) Excel census, and (c) any other information to Proposal-Request@llic.com . Proposals will be provided within 3-5 business days after all necessary information has been received.
ADDITIONAL COMMENTS ABOUT PLAN

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