



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](mailto:Proposal-Request@llic.com). Requests and Census documents without complete information will not be able to be processed.

GENERAL INFORMATION

EMPLOYER NAME

[Empty text box for 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 Unknown

ADDITIONAL INFORMATION

Other Retirement Plans

Does the Employer currently sponsor a qualified retirement plan? Yes No

If yes, what kind of plan:

[Empty text box for plan details]

Note: If there is an existing 401(k)/Profit Sharing plan, please provide a copy of the Adoption Agreement. Proposal cannot be started without review of documentation.

Has the Employer ever previously sponsored a retirement plan? Yes No

If yes, provide the termination date:

Type of plan:

[Empty text box for termination date]

[Empty text box for 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.



