



**Pension Plan
Proposal Request Form**

(www.pensionbenefits.com/customers/forms/Proposal_Request_Form_Pension.doc)

Name of Employer (Sponsor): _____

Type of Entity (Circle one item): Corporation; S-Corp; Sole Proprietor; Partnership;
Public School; Government; Other: _____

Date Business Began: ____ / ____ / ____
 YYYY MM DD

Employer Fiscal Year End: ____ / ____
 MM DD

Census

Name of Employee	Social Security #	DOB	DOH	DOT	Annual Hours	Compensation
	- -					
	- -					
	- -					
	- -					
	- -					
	- -					
	- -					
	- -					
	- -					
	- -					

Existing Retirement Plans (Please Provide Info on you Existing Plans, if applicable)

Name of Plan	Type of Plan (Circle One)	Plan Number	Annual Contribution by Employer
	DB / DC		
	DB / DC		
	DB / DC		

Check Maximum Contribution or Provide Annual Contribution Goal (Amount) for New Plan:
___ Maximum Contribution or \$ _____

- Check Type of Pension Plan:
- ___ 401(k) and/or profit sharing plan
 - ___ Traditional DB Plan with 401(k) overlay
 - ___ Traditional DB Plan without 401(k) overlay
 - ___ Cash Balance Plan
 - ___ New Comparability Cash Balance Plan
 - ___ Please Recommend

Signed By: _____

Date: _____

Return to: PensionBenefits, Inc.
700 E. Park Blvd., Suite 108
Plano, TX 75074

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Email: actuary@pensionbenefits.com