

National Retirement Services, Inc.

Proposal Request

Requestor Information:

Name: _____

Company: _____

Address: _____

City, State & Zip: _____

Phone: _____ Fax: _____

E-mail: _____

Prospective Client Information:

Prospective Client Name _____

Type of business [Corporation (S or C), Sole Proprietor, etc.] _____

Is prospective client a subsidiary of another company? _____ Yes _____ No

Do owners also own other companies with employees? _____ Yes _____ No

Does the prospect use leased employees? _____ Yes _____ No

Does your client have, or ever had, a Defined Benefit Plan? _____ Yes _____ No

Please provide a proposal for (circle one):

Defined Benefit Money Purchase Profit Sharing Allocated 401(k) Other

If there is an existing plan, it is a (circle one):

Money Purchase Profit Sharing 401(k) Other

If yes, to the above question how is the current plan valued (circle one):

Daily Annually Semi-Annually Quarterly

Estimated Eligible Employees: _____

Estimated Transfer Assets: _____

Investments to be placed: _____

Date Proposal Needed: _____

Additional Comments: _____
