



Pension Plan Request Form

Today's Date: _____ Client Number: _____ Client Name: _____
 Phone#: _____ Fax#: _____ E-mail: _____
 Effective Date: _____ Requested by: _____

Type of Plan:

- 401(k) Simple 401(k) 457 403(b) Annuity SIMPLE IRA SEP IRA Other

Plan Administrator Information

Name: _____ Contact: _____
 Phone#: _____ Fax#: _____ E-mail address: _____
 Plan ID#: _____ Policy ID: _____

Employee Contribution Information

- How is the contribution computed? Percent Fixed Both
- Can there be a "catch-up" contribution? Yes No
- List any earnings types that are excluded from the calculations: _____

- Does the plan allow for 401(k) loans? Yes No
- How many loans can an employee have open at once? _____
- Is there a Safe Harbor Match? Yes No
 (a match on EE's who are not contributing to the plan)

Employer Contribution Information

- Does the employer match employee contribution? Yes No
- Are employee "catch-up" contributions matched? Yes No
- Do you want the match computed with each payroll? Yes No
- How is the match computed? _____

- Does the match stop when the employee contributions stop? Yes No
- Is the match calculation using the same earnings as the employee contributions? Yes No
- Show the match on the check stub? Yes No

Please Return the Completed Form to your Client Service Representative