



401(k) Proposal Request Form - WBBA

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Fill out and fax back to your Pension Consultant at the number listed above.

Company Name: \_\_\_\_\_

Company Contact: \_\_\_\_\_

Address: \_\_\_\_\_
\_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Do you have an existing plan? \_\_\_\_\_

Number of plan participants: \_\_\_\_\_

Number of eligible employees: \_\_\_\_\_

Existing plan assets: \_\_\_\_\_

Ongoing annual contribution:

Employee \$ \_\_\_\_\_

Employer Match \$ \_\_\_\_\_

Profit Sharing \$ \_\_\_\_\_

Current Administration/Investment Provider \_\_\_\_\_

Current Investment Options: \_\_\_\_\_

Client's concerns: \_\_\_\_\_
\_\_\_\_\_
\_\_\_\_\_

