



## Proposal Request Form

The data below will provide the information necessary to generate a plan proposal. Please complete all information.

Employer Name \_\_\_\_\_

Employer Address \_\_\_\_\_

Business Entity:  C-Corp. (W2)  S-Corp. (W2)  Partnership (K-1)  Sole Proprietor (net Schedule C)  LLP  
 LLC (indicate LLC tax filing status)  Partnership or  Corporation or  Sole Proprietor

Fiscal Year \_\_\_\_\_ Desired annual contribution \$\_\_\_\_\_ Anticipated retirement age of owner \_\_\_\_\_

## Plan Design Proposals:

- Traditional Defined Benefit Plan
- 401(k) Profit Sharing Plan

- 412 Fully Insured Defined Benefit Plan
- Safe Harbor 401(k) Profit Sharing Plan

- Profit Sharing
- Cash Balance Plan

Does the employer now have or ever had a retirement plan?  Yes  No If yes, (Including a SEP, SIMPLE or any other retirement plan)

Do the owners have ownership interests in other businesses?  Yes  No If yes,

Is the employer a controlled group or affiliated service group?  Yes  No If yes,

Does the employer use leased employees, union employees or independent contractors? If yes, indicate in census.  Yes  No If yes,

Submit census using excel spreadsheet (sample spreadsheet on LLIC website) or complete the form below.

Representative to be contacted:

Lafayette Life Affiliation (Contracted agent, Uncontracted agent, IMO, other) Ronald Lawless

Agent/Agency Name **Ronald Lawless**

Address P.O. Box 82, Oak Park, IL 60303

812.812.8571 888-551-2791 lawless@thelawlessreport.com

Data proposal needed

Fax or email your completed proposal requests to a Pension Sales Consultant at Lafayette Life:

Proposed request@llio.com, Fax Number 513.363.2473, Phone Number 513.363.4800



**Proposal Request Form  
Client Review Topics**

Review the following questions with your client and submit along with the completed Proposal Request Form to Lafayette Life's Retirement Services Department. With these tools, we can assist you and the client in the design of a retirement plan that will help meet the client's needs.

Answer Yes or No to the following questions:

Does the client...

- Need a long-term savings program to shelter income and save for retirement?
- Need a larger tax deduction?
- Own a profitable business (C or S corporation, partnership, sole proprietorship, LLC, LLP)?
- Have cash flow to fund a pension benefit with required annual contributions?
- Have cash flow to fund discretionary contributions?
- Want to maximize benefits for owners and key employees?
- Need life insurance to provide a pre-retirement death benefit with tax-deductible premiums?
- Have an existing retirement plan? If yes, provide details.
- If the client currently has a plan, does it meet the employer's retirement objectives?

Employer's Retirement Plan Objectives:

Additional Comments \ Information: