



Proposal Request Form

Please complete all information and return (1) Proposal Request Form and (2) Census to Proposal-Request@llic.com. Requests and Census documents without complete information will not be able to be processed.

GENERAL INFORMATION

EMPLOYER NAME

HOW IS THE COMPANY TAXED?

☐ Corporation (C-corp or S-corp) ☐ Partnership ☐ Sole Proprietor

What is the tax year for the proposal? _____

What is the budget for contributions? \$ _____
(if blank we will illustrate maximum)

PLAN DESIGN:

Please check desired plan type, if known:

☐ 412(e)(3) Fully Insured Defined Benefit ☐ 401(k) Profit Sharing ☐ Cash Balance ☐ Unknown

ADDITIONAL INFORMATION

Other Retirement Plans

Does the Employer currently sponsor a qualified retirement plan? ☐ Yes ☐ No

If yes, what kind of plan:

Note: If there is an existing 401(k)/Profit Sharing plan, please provide a copy of the Adoption Agreement.
Proposal cannot be started without review of documentation.

Has the Employer ever previously sponsored a retirement plan? ☐ Yes ☐ No

If yes, provide the termination date:

Type of plan:

Controlled Group

Does the owner(s) have ownership in any other businesses? ☐ Yes ☐ No

If yes, is the Employer part of a controlled group or affiliated service group? ☐ Yes ☐ No

Note: Employer's CPA or attorney can provide this info.



EMPLOYER CENSUS

Please submit completed Excel census in electronic format. Sample census available at:

<https://agent.llic.com/ProductsAndServices/RetirementServices/FormsAndReferenceMaterials>

AGENT INFORMATION

Lafayette Life Affiliation (check one):

☐ Contracted Agent ☐ Uncontracted Agent ☐ IMO ☐ Other

AGENT/AGENCY NAME

TELEPHONE NUMBER

EMAIL ADDRESS

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NOTES

Please email (a) proposal request, (b) Excel census, and (c) any other information to Proposal-Request@illic.com.

Proposals will be provided within 3-5 business days after all necessary information has been received.

ADDITIONAL COMMENTS ABOUT PLAN

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.