



Please complete all information and return (1) Proposal Request Form and (2) Census to [Proposal-Request@llic.com](mailto: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**

For more information, contact the Office of the Vice President for Research and Economic Development at 319-273-2500 or [research@uiowa.edu](mailto:research@uiowa.edu).

## TELEPHONE NUMBER

## EMAIL ADDRESS

For more information, contact the Office of the Vice President for Research and Economic Development at 505-274-3000 or [research@unm.edu](mailto:research@unm.edu).

## NOTES

Please email (a) proposal request, (b) Excel census, and (c) any other information to [Proposal-Request@llic.com](mailto:Proposal-Request@llic.com).

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

## **ADDITIONAL COMMENTS ABOUT PLAN**

