



INFORMATION REQUEST FORM:

INFORMATION REQUEST

Please take a moment to complete and send the following form, and we will show you how we can work with you. If you want to talk with us immediately, please call Fidelis Fiduciary Management at **813.868.1927**. Thank you for your interest!

Your Name	CONTACT US		
Organization	Please submit this contact form by clicking on the "Submit by E-Mail" button or print the form and e-mail it to info@FidelisFiduciary.com		
E-mail:			
Contact info:	Phone Number:	Cell:	

I am a:	Financial advisor	Internal Sales Assistant
	Employer / Plan Sponsor	Third Party Administrator
	401(k)/403(b)/457(b)Rep ("Wholesaler")	Other (Insert fillable comment field)

Address 1			
Address 2			
City	State	Zip	

Please send me:	General information on Fidelis	A proposal (complete plan information below)	Other information (describe):
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Comments

PROPOSAL INFORMATION (IF A PROPOSAL IS REQUESTED AT THIS TIME)

Name of Employer or Plan				
State	Plan Type			
	401(k)	403(b)	Government 457(b)	Other (Describe in "Comments")

Plan Assets	\$	Fidelis is the fiduciary that listens. If you want to provide additional information or discuss the fiduciary support that best fits your plan, please call 813-868-1927 to talk with a consulting fiduciary.
Plan Participants		