Request for Proposal - RFP

E-mail completed form to:
trushton@nationalpensions.com
nick@nationalpensions.com

Telephone: (877) 252-1692
6995 S. Union Park Center, #190
Cottonwood Heights, UT 84047

Business Name	Tax Year Month/ Year	Date of Incorporation (optional) MM/DD/YY	Proposed Year Ending (optional) MM/YY

Owner:	Phone:	Email:

Other 401(k) Plan	Yes ☐	No ☐	Thrift Savings Plan
Other Defined Benefit Plan	Yes ☐	No ☐	Federal Employee Retirement System (FERS)
Other Business Ownership Interest	Yes ☐	No ☐	None

Business Entity: Sole Prop. / Partnership / S Corp / PLLC / LLC etc.	Business Address: (street, city, state, zip)

Budget: (what the client wants to contribute)	$

CPA's Name:	CPA's Firm: (optional)	CPA's Telephone:

Financial Advisor's Name:	Financial Advisor's Address (street, city, state, zip)

FA's Phone:	FA's Fax:	FA's Email Address:

Employee Census Data:

Name:	Birth Date	Hire Date	Actual W2 Earnings	Hours Worked 1000+	% Owned	Family or Key Empl.	Sched. K Income

Please indicate employees you prefer to include in the defined benefit pension plan. Also, please indicate those you prefer to exclude from that plan. The more information you give us the better the initial design.