



**IN ORDER TO OBTAIN A PROPOSAL PLEASE PROVIDE THE FOLLOWING:**

**NAME OF COMPANY:**

**CURRENT PLAN ASSETS (IF TAKEOVER):**

**ELIGIBLE EMPLOYEES:**

**ROLLOVERS (IF ANY):**

**EXISTING SEP/SIMPLE PLAN?      YES              NO**

**NOTES:**

**ONCE COMPLETE PLEASE EMAIL TO:**

**ELIZABETH KUROSKI**

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