

# Progressive Pension Administrators, Inc. Request for Proposal

Company Name:

Address:

Contact Person:

Title:

Email Address:

Phone Number:

Fax Number:

Business Form:  Corporation  S Corporation  Partnership  LLC  
 Sole proprietorship  Non-profit  Other:

Names of affiliated or subsidiary entities under common control:

Are there union employees?  yes  no

Does your business lease employees?  yes  no

Present number of plans:

Type of Plan:  401(k)  
 Profit sharing plan with 401(k) feature  
 Profit sharing only  
 Money purchase pension plan  
 Safe Harbor 401(k) Plan  
 New Comparability profit sharing plan  
 Age Weighted profit sharing plan  
 Other:

Current plan document:  Standardized prototype plan  Non-standardized prototype plan  Volume submitter plan  Individually drafted plan

Investment direction:  Employer directed  Employee Directed

If participant directed, current number of investment funds:

Does the plan have any company stock?

Does the existing plan have outstanding loans?  no  yes - How many?

Contribution sources:  401(k) deferrals  
 Matching contributions  
 Profit sharing/ESOP/Money Purchase  
 After-tax employee contributions  
 Other:

Market Value: \$

Current number of participants:

Plan objectives:  Maximize annual tax deductions  
 Help attract employees  
 Benefit key employees  
 Provide retirement security for employees  
 Motivate employees for profit improvement

Comments:

**Please fax (239)939-3499 or email [bobpuls@progressivepension.com](mailto:bobpuls@progressivepension.com) this completed form and the Census Information form. A representative from our firm will contact you promptly.**

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