



Proposal Information Form

***Please try to find as much information as possible. The more information we have, the more accurate the proposal will be. Thank you!**

Advisor:

Company:

Total Plan Assets:

Total Eligible Participants:

Current Investment Platform:

Current TPA Fees:

Current Record Keeping Fees (if applicable):

***Please include the following if possible:**

- List of current investments/mutual funds
- Copy of the summary plan description