

Please complete the following questionnaire and fax to 727/445-7721 to request additional information and/or a proposal. A customized illustration can be provided by completing the following and then following the link below to the Employee Census Input Spreadsheet. **A customized illustration cannot be prepared without complete and accurate census data.**

All questions must be answered.

Your Information:					
Name					
Company Name					
Address					
City		State		Zip	
Email					
Telephone				Fax	
Client Information:					
Company Name					
Contact Name					
Contact Title					
Address					
City		State		Zip	
Email					
Telephone				Fax	
Organization Structure					
Number of EEs over 20hours/wk					
Is this company part of a controlled group?	<input type="checkbox"/> Yes <input type="checkbox"/> No				
How often is payroll processed?					
Does the company currently have a plan?	<input type="checkbox"/> Yes <input type="checkbox"/> No				
What is the company's primary concerns?					
What is the maximum employer contribution amount?					
<p>You have now completed the proposal request form. To have a customized illustration run (at no charge), complete an Employee Census.</p>					