

# Request for Proposal - RFP

E-mail to: [Max@nationalpensions.com](mailto:Max@nationalpensions.com)

1224 E. Ft. Union Blvd, #350  
 Cottonwood Heights, UT 84047  
 Telephone: (877) 252-1692



<b>Business Name</b>	<b>Tax Year</b>	<b>Date of Incorporation (optional) MM/DD/YY</b>		<b>Proposed Year Ending (optional) MM/YY</b>			
				12/31/20__			
<b>Owner:</b>		<b>Phone:</b>		<b>Email:</b>			
<b>Other 401(k) Plan</b>		<b>Yes</b> <input type="checkbox"/>	<b>No</b> <input type="checkbox"/>				
<b>Other Defined Benefit Plan</b>		<b>Yes</b> <input type="checkbox"/>	<b>No</b> <input type="checkbox"/>				
<b>Other Business Ownership Interest</b>		<b>Yes</b> <input type="checkbox"/>	<b>No</b> <input type="checkbox"/>				
<b>Business Entity:</b> Sole Prop. / Partnership / S Corp / PLLC / LLC etc.			<b>Business Address: (street, city, state, zip)</b>				
<b>Budget: (what the client wants to contribute)</b>				<b>\$</b>			
<b>CPA's Name:</b>		<b>CPA's Firm: (optional)</b>		<b>CPA's Telephone:</b>			
<b>Financial Advisor's Name:</b>		<b>Financial Advisor's Address (street, city, state, zip)</b>					
<b>FA's Phone:</b>		<b>FA's Fax:</b>			<b>FA's Email Address:</b>		
<b>Employee Census Data:</b>							
<b>Name:</b>	<b>Birth Date</b>	<b>Hire Date</b>	<b>Actual W2 Earnings</b>	<b>Hours Worked 1000+</b>	<b>% Owned</b>	<b>Family or Key Empl.</b>	<b>Sched. K Income</b>

The more information you give us the better the initial design. Notes are helpful.