HOW TO REQUEST A PROPOSAL

For a quick fee quote or contribution illustration, email or fax the following information to your regional Benetech Consultant, or directly to our Proposal Department:
proposals@benetechinc.com
fax: 888.484.6870
phone: 800.285.7526

Quick Fee Quote
- Company or plan name.
- Takeover or start-up ($0 assets) plan?
- Standard or Tiered/New Comp plan?
- Current plan assets to be transferred.
- Expected recurring deposits in next 12 months.
- Number of participants – with balances.
- Number of participants – eligible.
- Financial advisor name and firm (etc.).
- Email delivery instructions (to you only, or cc others).

Contribution Illustration & Fee Quote
Above information, plus the following.

Basic plan information:
- Eligibility (service and age requirements; entry dates).
- Safe Harbor (No/Yes; if "Yes", type of safe harbor).

Employee Census Information:
- Date of birth.
- Date of hire.
- Date of termination (only if terminated in current year).
- Estimated total W2/earned income for current year.
- Whether employee works less than 1,000 hours.
- Ownership percentage.
- Whether employee is related to an owner.