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Boca Raton, FL 33431

Today's Date: \_\_\_\_\_

To obtain a custom retirement plan fee proposal, please complete and return this form to Oriental Pension Consultants.

INVESTMENT ADVISOR INFORMATION

Please enter all information as it should appear on the proposal.

Name: \_\_\_\_\_ Company Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

PLAN INFORMATION

Plan Name: \_\_\_\_\_ Current Provider: \_\_\_\_\_

Current Trustee: \_\_\_\_\_ Type of Plan: \_\_\_\_\_

Total Assets: \$ \_\_\_\_\_ Total Number of Employees: \_\_\_\_\_

Total Number of Eligible Employees: \_\_\_\_\_ Total Number of Participants: \_\_\_\_\_

Proposal is for:

- Full Service
TPA Services Only Name of TPA
Recordkeeping Only Name of Record Keeper/Investment Co.

Date proposal is needed: \_\_\_\_\_ (Standard turnaround time is 3-5 business days.)

Type of Proposal: E-mail E-mail Address:
Hardcopy If hardcopy, how many proposals are needed?

If Hardcopy, the proposal should be sent to the following address:

Name: \_\_\_\_\_ Address: \_\_\_\_\_
City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

How did you hear about us? \_\_\_\_\_

E-mail the completed form to Oriental Pension Consultants at supportservices@orientalpc.com.

Fax the completed form to 561-392-6559. For assistance from the Oriental Pension Consultants Support Services Team, please call 800-783-5149 or e-mail supportservices@orientalpc.com.