Confidential
Employee Census

Request for Pension Proposal

Name of Representative: _____

Address: _____

Phone: (____) _____ Fax: (____) _____ E-mail: _____

Name of Business: _____

Tax Status: ☐ Incorporated ☐ Date of Incorporation: _____

☐ Unincorporated ☐ Date business began: _____

Tax Year End: _____ Approximate Contribution Desired: $ _____
(Percent of pay or dollar amount)

Any current pension plan in force? ☐Yes ☐ No
(If so, supply details on a separate sheet)

Do the owners have ownership interests in any other firms? ☐Yes ☐ No
(If so, supply details on a separate sheet)

Additional comments related to plan design such as type of plan desired, which employees to favor, flexibility desired in contribution level, etc.: _____

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Note: You may fax to United Underwriters at 603-778-7918 or call for assistance at 800-258-7296.

Confidential Employee Census

Please complete on all employees even if not included in the plan

				See Note below and check if:		
Name	Date of Birth	Date of Hire	Salary	Part Time	Ownership Percentage	Relationship to Owner

Note: "Part Time" means that the employee works less than 1,000 hours per year. List "Ownership Percent" of all Owners. State family relationships to Owner(s) such as spouse, child, parent, etc.