RPG Consultants
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Valley Stream, NY 11581
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Proposal Data Request

Plan Information	**Advisor Information**
Company Name: ______________________________	Advisor Name: ______________________________
Proposal Contact Name: ______________________________	Advisor Firm: ______________________________
Proposal Contact Title: ______________________________	Advisor E-Mail: ______________________________
Proposal Contact E-Mail: ______________________________	Advisor Phone: ______________________________
Proposal Contact Phone: ______________________________	Advisor Annual Fee: ______________________________
Plan Assets: ______________________________	
Total Eligible Employees: ______________________________	
Total Plan Participants: ______________________________	

Start-up Plan

1) Provide a census (sample below) that includes the following:

   SSN#, Last Name, First Name, Ownership %, Family Relationship to Owner, M/F, Date of Birth, Gross Wages, Hours Worked > 1000 (Y/N)?

SSN#	Last Name	First Name	Ownership %	Family Relationship to Owner	M/F	Date of Birth	Date of Hire	Gross Wages	Hours Worked > 1000 ? (Y/N)
123456789	Doe	John	1	Principal	M	mm/dd/yyyy	mm/dd/yyyy	50000	X

2) Provide a narrative of Owners/Partners objectives for themselves.

Existing Plan

For a complete proposal including fee/investment analysis of current Plan, please provide:

1) *Most recent quarterly investment summary that provides name of fund and total $ value per fund;*
2) *Current Contract(s) with Plan Provider(s) with most recent 404(a)(5) and 408(b)(2) Disclosure Notices.*

For a consulting analysis of current Plan, please provide:

1) *Plan Document, Adoption Agreement and/or Summary Plan Description;*
2) *Most recent Year End Valuation Report that includes discrimination testing;*
3) *A brief narrative of objectives and/or current issues.*

Please submit all proposal requests documents to marketing@rpgconsultants.com
or call 212-947-4800 x 225 if you have any questions.