



## REQUEST FOR PENSION PROPOSAL

**INSTRUCTIONS: Complete all necessary information along with employee census information.**

GENERAL INFORMATION	
Prospect:	Nature of Business:
Address:	Contact Person:
Proposed Effective Date :                      Yr / Mth / Day	Telephone #:
	Email:
Agent: _____                      Agent # : _____ Agent Telephone#: _____                      Email: _____ Branch / Agency : _____	
PLAN PROVISIONS	
<b>1. Defined Contribution</b>  State Employee and Employer Contribution Rate:  1. Employee Contribution: _____ % of Salary; Employer Contribution: _____ % of Salary  <p style="text-align: center;"><b>OR</b></p> 2. Employee Contribution: _____ % of Salary up to National Insurance Salary Maximum plus _____ % Salary in Excess; Employer Contribution: _____ % of Salary up to National Insurance Salary Maximum plus _____ % Salary in Excess  <p style="text-align: center;"><b>AND</b></p> 3. Include a Past Service Benefit?    Yes            No	
<b>2. Defined Benefit</b>  State Accrual Rate for Pension Benefit and Employee Contribution Rate  1. Accrual Rate for Pension: _____ % of Salary for _____ years of service  2. Employee Contribution I. _____ % of Salary <b>OR</b> II. _____ % of Salary up to National Insurance Salary Maximum plus _____ % of Salary in Excess  3. Include a Past Service Benefit?    Yes            No  4. Integrate the Plan with the National Insurance Pension Benefit?    Yes            No	
<b>3. Retirement Age:</b>  Normal _____ years old                      Early _____ years old                      Late _____ years old	
<b>4. Form of Benefit:</b> (a) Single Life <b>OR</b> (b) Joint & Survivor with _____ % Spousal Reversion <p style="text-align: center;"><b>AND</b></p> (c) Guaranteed Period: _____ years	

**EMPLOYEE CENSUS INFORMATION IN A MICROSOFT EXCEL FILE WITH DATES IN DD/MM/YYYY FORMAT MUST INCLUDE: DATE OF BIRTH, GENDER, DATE OF EMPLOYMENT (FOR PAST SERVICE IF REQUESTED), SALARY & MODE OF SALARY (E.G. MONTHLY OR ANNUALLY). IF THERE ARE ANY ADDITIONAL CONSIDERATIONS, PLEASE NOTE ON THE BACK OF THE FORM.**