



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. _____

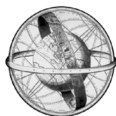
Note: You may fax to ANICO Pension Sales @ (409) 766-6995 or call for assistance (888)909-6504

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

[illegible]

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.



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