

# THE BENEFITS CONSULTING GROUP, INC.

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Chicago, IL 60604  
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FAX (312) 427-9757

DATE \_\_\_\_\_

NAME		
ADDRESS		
CITY	STAT	ZIP
PRINCIPAL CONTACT		PHONE
TYPE OF ENTITY	TAX ID	SIC
REFERRL SOURCE		

**ELIGIBILITY** SERVICE \_\_\_\_\_ HOURS \_\_\_\_\_ MINIMUM AGE \_\_\_\_\_  
ENTRY DATES \_\_\_\_\_ INCLUDE UNION  YES  NO

**PROFIT SHARING** INTEGRATED  YES  NO LAST DAY  YES  NO  
1000 HOURS  YES  NO

**MATCH** DISCRETIONARY  YES  NO FIRST YEAR % \_\_\_\_\_ ELIGIBLE SAL DEF \_\_\_\_\_  
LAST DAY  YES  NO THROUGHOUT YEAR  YES  NO 1000 HOURS  YES  NO

**VESTING**  3-20  OTHER \_\_\_\_\_ EXCLUDE SVC PRIOR TO \_\_\_\_\_

**MISCELLANIOUS** LOANS  YES  NO MINIMUM LOAN \_\_\_\_\_ ONE AT A TIME  YES  NO  
HARDSHIP  YES  NO DATE & TIME OF ENROLLMENT \_\_\_\_\_  
# OF EES \_\_\_\_\_ INVESTMENTS \_\_\_\_\_  
TRUSTEES \_\_\_\_\_  
IMMEDIATE ROLLOVER  YES  NO COMPENSATION \_\_\_\_\_

**COMMENTS** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
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NEW 401(k) INFORMATION