



# 401kExchange Proposal Request

Please fill out form and fax or e-mail to ING contact information below.

## Plan Information:

Company Name:

Estimated Transferred Assets:

Estimated Annual Contributions:

# of Eligible Employees:

# of Current Participants:

Type of Plan  401(k) w/ match  401(k) - no match  Money Purchase  
 Profit Sharing  Other

Would you like to show any of the following options?

- Plan Sponsor Fiduciary Services  Morningstar Retirement Manager  Self-Directed Brokerage Account

## Existing Vendor / Provider:

Existing Vendor/Provider Name:

Existing Recordkeeper/TPA:

Do you currently work with a TPA or would you like us to recommend one and obtain pricing?

## Broker/Advisor Information:

Name:

Agency Name:

B/D Affiliation:

Phone:

Email:

Proposal Copies:   
(standard is 1)

Date Needed

## ING Contact Information:

ING Corporate Markets Sales Support **Phone:** (866) 481-3653, Option 4  
[CorporateMarketsSalesSupport@us.ing.com](mailto:CorporateMarketsSalesSupport@us.ing.com) **Fax:** (860) 580-0426

Your ING Regional Director or Internal Wholesaler will contact you within 24 business hours with your proposal's pricing specifics.  
Your ING Regional Director may also be available to assist you with your Sales Call and Presentation.