

Pension Rescue Proposal Request
Please Fax Completed Form To: 1-585-244-7043
Attention: Mark E. Kluge, CLU

Date: ____/____/____

Broker Name: _____ Phone: (____) ____-_____

1. Client or Case Name:

2. Client's Dates of Birth

Husband: ____/____/____

Wife: ____/____/____

3. Current Value of Qualified Plan or IRA Rollover

\$ _____

4. Current Net Worth \$ _____

5. How is the new profit sharing plan to be created?

6. Is client's goal generational wealth transfer or retirement benefits? ___ wealth transfer ___ retirement income benefit