PRS
PENSION REVIEW SERVICES

Administrative, Consulting & Actuarial Services

445 Broad Hollow Road, Suite 8 ● Melville, New York 11747 ● 516-694-5500 ● Fax 516-694-5501 ● info@pensionreviewservices.com

EXISTING PLAN INFORMATION

1. **Name of Plan:** _____

   _____

2. **Type of Plan:** ☐ Defined Benefit ☐ Profit Sharing ☐ Money Purchase
   ☐ 401(k) ☐ Cafeteria ☐ Other: _____
   (Describe)

3. **Trust Identification Number:** _____

4. **Plan Number:** _____

5. **Are there life insurance policies purchased by the plan?** ☐ Yes ☐ No

6. **For what Plan Year End do you expect PRS to begin to administer the plan?** _____

7. **Reasons for leaving your current administrator:** _____

   _____

   _____

Completed by: _____ **Date:** _____