



Navigator 401k Proposal Request

Proposal Menu: **Mutual Fund** **Blend** **ETF** **Dqyj**

Other Combination: _____

Plan /Sponsor Information:

Plan Name _____

Contact _____

Address _____

City, St., Zip Code _____

Phone _____ Email _____

Number of Eligible Employees _____ Number of Plan Participants _____

Assets in the Plan \$ _____ Annual contributions to the Plan \$ _____

Annual Fees paid for Current Plan Services: \$ _____

Please pick-up: Copy of Current Enrollment Booklet, Summary Plan Description, and Form 5500

Advisor and TPA Information:

Name of Advisor _____

Compensation Amount _____

Address _____

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Phone _____ Email _____

TPA Options: Bundled Unbundled

Name of TPA (If UNBUNDLED) _____

TPA Set-up Fees (If UNBUNDLED) _____

Contact Person _____

Phone _____ Email Address _____

Send to:*****

**Granite Retirement Services
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