

# Run a JH Proposal

At John Hancock we're easy to do business with. Simply fill out the form below and a JH sales associate will contact you within 1 business day to review the information provided and prepare a proposal for you.

## TPA INFORMATION

TPA Firm Name: 401KInABox

TPA ID: 66887

## COMPANY INFORMATION

Company Name:

Business Address:

City:

State:

Zip:

Type of Business (Corporation, Partnership, etc.):

## CONTRACT DETAILS

Contract fees  Option 1: Deduct from participant accounts  Option 2: Bill to the plan sponsor

Note: Plans can elect to have all administration fees for the plan deducted from participant accounts (assets in the plan) or can choose to have the employer billed directly for a portion of the plan costs.

Safe Harbor: YES

Number of Participants:

Estimated Transfer:

Estimated Flow (recurring deposits):

## KEY PEOPLE

Note: Plans must have at least one trustee. The trustee is the primary party responsible for the plan with ultimate authority to make plan-level decisions and approve financial transactions).

### Trustee

Name:

Phone:

Email:

### Additional Trustee

Name:

Phone:

Email:

## FINANCIAL REPRESENTATIVE INFORMATION

Financial Representative First Name:

Financial Representative Last Name:

Email Address:

Phone Number:

Email: [us\\_usgp\\_east\\_leads@jhancock.com](mailto:us_usgp_east_leads@jhancock.com)

**John Hancock** – we're easy to do business with and we make plans work!



John Hancock Life Insurance Company (U.S.A.) and John Hancock Life Insurance Company of New York are collectively referred to as "John Hancock".

John Hancock and United Retirement Plan Consultants are not affiliated and neither are responsible for the liabilities of the other.

Group annuity contracts and recordkeeping agreements are issued by John Hancock Life Insurance Company (U.S.A.), Boston, MA (not licensed in New York) and John Hancock Life Insurance Company of New York, Valhalla, NY. Product features and availability may differ by state.

The Investment Management Services Division of John Hancock provides investment information relating to the group annuity contract.

NOT FDIC INSURED | MAY LOSE VALUE | NOT BANK GUARANTEED

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