

Don't Wait. Contact us today!

Complete and return this response form to request an apples-to-apples comparison. Please note that Big "I" MEP 401(k) Plan is available exclusively to IIABA members in good standing.



Big "I"
**RETIREMENT
SERVICES**

Agency Information

Agency name: _____

Contact: _____
Last *First* *M.I.*

Address: _____
Street Address *Unit #*

_____ *City* *State* *ZIP Code*

Phone: _____ Email: _____

Status

Currently a Big "I" member? **YES** **NO**

Currently have a 401(k) plan? **YES** **NO**

Number of participants: _____

Total Assets: _____

Please attach:

Copy of latest participant fee disclosure (404a-5)

Copy of latest plan fee disclosure (408b-2)

Optional:

Copy of Summary Plan Description

Copy of Adoption Agreement

Know of another agency that could benefit from a free plan review/cost comparison?

Please provide their name and email address: _____

Submit to Christine Muñoz, VP Big "I" Retirement Services, LLC at christine.munoz@iiaba.net.

Questions? Contact Muñoz at (800) 848-4401.