

Request for Nationwide Proposal

Name of Agent: _____

Name of Agency: _____

Name of Broker/Dealer: _____

Agency Address: _____ City, State, Zip: _____

Telephone #: _____ Fax #: _____

If selling the Trust product, does your B/D have a selling agreement to sell this product? _____

Name of Business: _____

City, State, Zip: _____

Telephone #: _____ Fax #: _____

Email Address: _____ # of Employees: _____

Business Type: _____ C Corporation _____ Government _____ Proprietorship
_____ Prof Corporation _____ Non-Profit/501c3 _____ Partnership
_____ Sub-S Corporation _____ Non-Profit- Other _____ Other: _____

Is the business associated with any other business by common ownership or by maintaining an affiliated service group?
_____ NO _____ YES (please attach a complete description of all common ownership and affiliations.)

Does the employer use services of leased employees? _____ NO _____ YES

Is there a Union with which retirement benefits have been the subject of good faith bargaining? _____ NO _____ YES

Does the employer maintain a Section 125 (cafeteria plan)? _____ NO _____ YES

Does the employer currently have a qualified retirement plan? _____ NO _____ YES

Name of Prior Investment Company _____

_____ NEW PLAN _____ TAKEOVER _____ PLAN YEAR END _____

Plan Type: _____ Defined Benefit _____ Profit Sharing _____ Money Purchase
_____ 401(k) w/o PS _____ 401(k) w/ PS _____ Target Benefit
_____ New Comparability _____ Age-Weighted PS

Will employer provide a matching contribution? _____ NO _____ YES _____% of the first _____%

Will employer provide a discretionary contribution? _____ NO _____ YES _____

Does the business wish to commit to a fixed contribution every year? _____ NO _____ YES _____

Contract Type: _____ Variable Fixed _____ Fixed _____ Indexed Fixed

Commission Table considered for Proposal: B-_____ Table _____ Add-on Trailer (IPV): _____

Estimated assets to be transferred within the next year \$ _____

Estimated amount of annual recurring contributions during the first contract year: \$ _____

INTERNAL USE ONLY

Is the broker appointed with Nationwide? _____ Has this been verified with NW? _____