

# Easy Does It

# How to Get Started with a Lafayette Life Qualified Retirement Plan

#### Start Here

Identify a client who profiles as a good prospect for a qualified retirement plan.

### Turn Here

Partner with Lafayette Life's Retirement Services. We'll help you and your client navigate the complex world of retirement planning.

#### Succeed Here

What may be your first-time is our forte. We'll help guide you through the process for creating a proposal, turning it into an in-force plan and getting it funded and you paid.

# Set Up a Plan in 5 Steps



## 1. Proposal Request

- > Work with your client to establish and understand their goals and parameters
- > Obtain information from the client and submit a Proposal Request form and participant census in digital Excel format to LLIC at proposal-request@llic.com



# 2. Proposal Creation

- > LLIC receives completed request and follows-up for any clarifications
- > Once in good order, Lafayette generates a proposal, generally within 3 days
- > Client review of proposal; communications with LLIC for additional variations and fine-tuning



# 3. Plan Acceptance

- Client agrees on final proposal
- Agent and client complete and submit Installation Packet to proposal-request@llic.com
- > Client sends plan installation fee to LLIC at: 400 Broadway, Cincinnati, OH 45202, Attn: Treasury



#### 4. Plan Installation

- LLIC Installation Coordinator creates official plan documents, generally within 2 weeks
- > LLIC returns final plan documents to agent and client. The plan becomes effective when the client signs the documents. Important: Please share signed documents with LLIC for our records.



# 5. Product Application & Funding

> If funding with Lafayette Life products, agent submits completed product applications to LLIC New Business at icenter@llic.com

Ready to get started? So are we. Put expertise and experience to work for you and your clients. Connect with our Retirement Services group at proposal-request@llic.com.

Retirement Services LafayetteLife.com · 800.555.6048

**ADMINISTRATION** DESIGN

FUNDING

Financial professional use only. Not for use with the public.

1 | 2

# Lafayette Life Retirement Services Team

## **Retirement Services Sales**



Warner Off Vice President 513.629.1452 warner.off@llic.com

> 15+ Years Experience > BS, Yale | JD, Emory

University



Mark Ditondo Vice President, Retirement Services Sales 401.241.4759 mark.ditondo@llic.com

- > 33+Years Experience
- > Life/CPA Seminar Certified
- > BS, Cornell University

### Sales Professionals



**Phil Germani** Senior Pension Sales Consultant 513.362.4936 phil.germani@llic.com > 40+ Years Experience

> QPA, JD, MBA



**Rosannah Slone** Sales & Installation Coordinator 513.361.7785 rosannah.slone@llic.com > 15+ Years Experience



**Christopher Bishop** Senior Pension Sales Consultant 513.362.4940 christopher.bishop@llic.com

- > 5+Years Experience
- > QKA

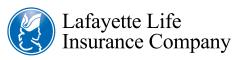
Life insurance and annuity products are not bank products, are not a deposit, are not insured by the FDIC nor any other federal entity, have no bank guarantee and may lose value.

The Lafayette Life Insurance Company does not provide legal or tax advice. The information herein is general and educational in nature and should not be considered legal or tax advice. Tax laws and regulations are complex and subject to change, which can materially impact investment results. Lafayette Life cannot guarantee that the information herein is accurate, complete, or timely. Lafayette Life makes no warranties with regard to such information or results obtained by its use, and disclaims any liability arising out of your use of, or any tax position taken in reliance on, such information. Please advise your customer to consult an attorney or tax professional regarding their specific situation.

The Lafayette Life Insurance Company provides services to pension plans as outlined in a separate Administrative Services Agreement, and issues life insurance and annuity products that may be used as funding options. This material is for informational purposes only. Lafayette Life does not serve as plan administrator or fiduciary, nor does Lafayette Life or its representatives provide ERISA, legal or tax advice. Your personal or legal tax advisors should always be consulted and relied upon for advice.

The Lafayette Life Insurance Company, Cincinnati, Ohio, operates in D.C. and all states except New York, and is a member of Western & Southern Financial Group, Inc.

© 2023 The Lafayette Life Insurance Company. All rights reserved.



A member of Western & Southern Financial Group

The Lafayette Life Insurance Company 400 Broadway Cincinnati, OH 45202-3341

> Retirement Services LafayetteLife.com · 800.555.6048

DESIGN

ADMINISTRATION

FUNDING