



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

DESIGN

ADMINISTRATION

FUNDING

Lafayette Life Retirement Services Team

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