

# RETIREMENT AND SAVINGS

QUOTATION QUESTIONNAIRE

ISSUED BY  
UTMOST WORLDWIDE LIMITED

A WORLD *of* DIFFERENCE

utmost™  
CORPORATE SOLUTIONS

**SECTION 1: COMPANY DETAILS**

Full Name:

Registered Address:

Telephone Number:

Fax Number:

E-mail address:

Website Address:

Contact Name(s):

Will this plan be dealing with 1 entity or several?

State number:

How many potential payrolls will Utmost Corporate Solutions be dealing with?

State number:

## SECTION 2: RETIREMENT / SAVINGS DEFINED CONTRIBUTION PLAN

### Structure

Is this a new plan?

Yes

No

What type of plan is required?

Savings Plan

Retirement Plan

Do you require the plan to be written under trust?

Yes

No

### Employee Details

a) How many employees are expected to join the plan at commencement?

b) What will be their normal retirement age?

 Years

### Currency

What currency would you like the plan to be denominated in?

US Dollars

Sterling

Euro

### Contributions

a) What levels of contribution would be provided for this plan?

Employer: Amount:  or Salary %:

Employee: Amount:  or Salary %:

b) What is the approximate average annual salary per employee?

c) Will employees make additional contributions on a voluntary basis?

Yes

No

d) How often will regular contributions be made?

Monthly

Quarterly

Half-Yearly

Yearly

e) Will employees be able to make a Transfer In from another plan?

Yes

No

f) Will the employer have a Transfer In value from another plan?

Yes

No

What is approximate Value?

### Withdrawals

Will an employee be eligible to make partial withdrawals before their normal retirement age?

Yes

No

### Other Requirements

Please give us details of any other features you may wish to include in your Retirement / Savings Plan?

**Organisational Type**

Non-Governmental Organisation	<input type="checkbox"/>	Regulated financial Institution	<input type="checkbox"/>	Other (Please specify)
Intergovernmental Organisation	<input type="checkbox"/>	Public Limited Company	<input type="checkbox"/>	
Private Limited Company	<input type="checkbox"/>	Subsidiary	<input type="checkbox"/>	
Charity	<input type="checkbox"/>	Corporate Trustee	<input type="checkbox"/>	

Name of Stock Exchange where company was registered, if applicable:

Nature of Business

Please return your completed questionnaire to:

Utmost Worldwide Limited

PO Box 613, Utmost House, Hirzel Street, St Peter Port, Guernsey, Channel Islands GY1 4PA

**Contact:**

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Jo.Smeed@utmostworldwide.com

**utmostworldwide.com**

**GROUP LIFE AND DISABILITY PRODUCTS**

Also available from Utmost Corporate Solutions are the following Life and Disability products:

**Group Life and Dependant's Pension**

Group Life cover provides a Lump Sum Benefit payable:

- in the event of an Employee's death whilst in service,
- in the event of death of an Eligible Spouse or Child.

Group Dependant's Pension provides a guaranteed regular income payable in the event of an Employee's death:

- to an Eligible Spouse,
- to an Eligible Child or Orphan.

**Group Long Term Disability (LTD)**

When an employee is absent from work for a long period of time due to an illness or Accident, Long Term Disability cover provides:

- An income replacement.
- Supplementary Benefits to cover pension contributions or insurance premiums.

**Group Total & Permanent Disability**

A Lump Sum Benefit payable in the event of an Employee suffering a Total Permanent Disability whilst in employment. Total Permanent Disability cover can also be available for Eligible Spouses.

**Group Accidental Death and/or Dismemberment**

To provide a Lump Sum Benefit in the event of an Employee's death due to an Accident or should the Employee suffer a dismemberment as a result of an Accident whilst in employment.


**Group Critical Illness**


To provide a Lump Sum Benefit in the event of an Employee being diagnosed with an insured Critical Illness whilst in employment.

If you require more information or a quotation please email [EmployeeBenefits@utmostworldwide.com](mailto:EmployeeBenefits@utmostworldwide.com) or visit **utmostworldwide.com**

# CONTACT US

To find out more  
please contact us.

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**utmost**<sup>™</sup>  
CORPORATE SOLUTIONS

Utmost Corporate Solutions is the trading name used by Utmost Worldwide Limited and a number of Utmost companies.

## A WORLD *of* DIFFERENCE

Utmost Worldwide Limited is incorporated in Guernsey under Company Registration No. 27151 and regulated in Guernsey as a Licensed Insurer by the Guernsey Financial Services Commission under the Insurance Business (Bailiwick of Guernsey) Law, 2002 (as amended).

**Registered Head Office:** Utmost House, Hirzel Street, St Peter Port, Guernsey, Channel Islands GY1 4PA.

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Websites may make reference to products that are not authorised or regulated and/or are not available for offering to planholders in certain jurisdictions.

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