

# RETIREMENT AND SAVINGS

## QUOTATION QUESTIONNAIRE

### USING THE EDITABLE FIELDS?

To ensure your information is saved correctly, we recommend you save the form to your desktop before you start completing the required fields.

### HOW TO COMPLETE THIS FORM

If completing a hard copy of this form, please use blue or black ink and BLOCK CAPITALS. If you make a mistake cross it out, put in the correct words and initial next to the correction. Do not use correction fluid

### PLEASE SEND COMPLETED AND SIGNED FORM TO

Utmost Worldwide Limited

PO Box 613, Utmost House, Le Truchot, St. Peter Port, Guernsey, GY1 1GR

[Retirement&Savings@utmostworldwide.com](mailto:Retirement&Savings@utmostworldwide.com)

## A COMPANY DETAILS

1. Full Name	<input type="text"/>
2. Registered address	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	<input type="text"/> Postcode <input type="text"/> Country
3. Telephone Number	<input type="text"/>
4. Fax Number	<input type="text"/>
5. E-mail address	<input type="text"/>
6. Website Address	<input type="text"/>
7. Contact Name(s)	<input type="text"/> <input type="text"/> <input type="text"/>
8. Will this plan be dealing with one entity or several?	
State number	<input type="text"/>
9. How many potential payrolls will Utmost Corporate Solutions be dealing with?	
State number	<input type="text"/>

## B RETIREMENT / SAVINGS DEFINED CONTRIBUTION PLAN

### STRUCTURE

1. Is this a new plan?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
2. What type of plan is required?	<input type="checkbox"/> Savings Plan	<input type="checkbox"/> Retirement Plan
3. Do you require the plan to be written under trust?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

## EMPLOYEE DETAILS

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

- What levels of contribution would be provided for this plan?  
**Employer** Amount  or Salary %   
**Employee** Amount  or Salary %
- What is the approximate average annual salary per employee?
- Will employees make additional contributions on a voluntary basis? ☐ Yes ☐ No
- How often will regular contributions be made? ☐ Monthly ☐ Quarterly ☐ Half-Yearly ☐ Yearly
- Will employees be able to make a Transfer In from another plan? ☐ Yes ☐ No
- Will the employer have a Transfer In value from another plan? ☐ Yes ☐ No  
 What is the 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"/> |
| Intergovernmental Organisation | <input type="checkbox"/> | Public Limited Company          | <input type="checkbox"/> |
| Private Limited Company        | <input type="checkbox"/> | Subsidiary                      | <input type="checkbox"/> |

Charity

☐

Corporate Trustee

☐

Other (Please specify)

Name of Stock Exchange where company was registered, if applicable

Nature of Business

## C 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 AND 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 [www.utmostinternational.com](http://www.utmostinternational.com)

A WORLD *of* DIFFERENCE

[www.utmostinternational.com](http://www.utmostinternational.com)

Utmost Worldwide Limited (No. 27151) also trading as Utmost Corporate Solutions, is incorporated in Guernsey. It is authorised and regulated by the Guernsey Financial Services Commission to conduct long term business and general business. Registered Office: Utmost House, Le Truchot, St. Peter Port, Guernsey, GY1 1GR. Utmost Worldwide Limited also holds a permit issued by the Jersey Financial Services Commission to conduct long term business in Jersey.

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