

## A Shariah-Compliant Investment Fund



### Request for Proposal for Bundled Retirement Services (Including the MIZĀN Fund)

Name of person submitting this request: \_\_\_\_\_

Employer/Practice name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email address: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

#### Plan type or features (check all that apply):

401(k)

matching contributions. Formula: \_\_\_\_\_

profit sharing plan

new comparability profit sharing plan

other: \_\_\_\_\_

#### If your plan is a safe harbor 401(k), which type?

Safe harbor match

Safe harbor core contribution (3% of pay)

New automatic enrollment safe harbor

Total number of employees: \_\_\_\_\_

Total number of participants with balance: \_\_\_\_\_

Total plan assets: \_\_\_\_\_

**Current Investment types (please check all that apply):**

Mutual funds

Separate accounts/variable annuities

Collective funds

Self-directed brokerage accounts

Other: \_\_\_\_\_

**Current provider:** \_\_\_\_\_

**Current recordkeeper:** \_\_\_\_\_

**Payroll is processed:**

in house

by payroll vendor: \_\_\_\_\_

Other: \_\_\_\_\_

**If you have any feedback or special goals for the plan, please describe here (e.g., improving participation, better service, improving fund lineup, reducing overall costs, maximizing pre-tax contributions for key employees, etc):**

**Please contact me for a discussion before the proposal is issued (check if applicable)**

**To whom should we address the proposal? (individual name or names, Retirement Plan Committee, etc):**

\_\_\_\_\_