

## Business Information / Company Profile

**GENERAL INFO**

Business Type:	Sole Proprietor?	Partnership?	Incorporated?
Business Name:			
Affiliated Bus. Names:			
Business Description:			
Business Address:			
Contact Name & Position:			
Phone:	Fax:	E-Mail:	
Do you have a current plan?	Yes      No	Current Plan Supplier	
Current plan in place for How Many Years?	Number of Employees Currently Enrolled?		
Are there Contractors on your plan?	Are there Contractors involved in the business?		

**CONCERNS ABOUT YOUR CURRENT BENEFITS PLAN**


**NOTES / ADDITIONAL INFORMATION**


***Do you have concerns about:***

***Corporate Buy-Sell Structures***

***Key Man Coverage***

***Executive Benefits Plans***

***Retirement Planning***

*Note: these items are generally subject to discussions with senior executives in order to determine needs, concerns, timing, and a whole host of other considerations, budget being a primary one. Your best option here is to fill out your contact info and we'll contact you to discuss.*

*The following documents may be required to make an accurate assessment of your business needs. Architype Financial holds these documents in strictest confidence. Much like a doctor or a lawyer, the more information you can provide, the better the solution will be.*

- 1. Current Plan Premiums – billing statement*
- 2. Employee Data Listing / Census to generate insurance industry quotes as needed*
- 3. Plan premium and claims record – the most recent 2 years (3 if possible)*
- 4. Agent of Record Letter – for quotes involving Life / LTD / Group CI*

**RETURN TO:**

**Architype Benefits – #206 – 1220 Falcon Dr. Coquitlam B.C. V3E 2E5**

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