

**~ Employee CENSUS & Market Survey Input Form ~**  
**COMPLETE TODAY & Email, Fax, or Mail To Obtain Your Proposal**

COMPANY NAME: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City/State/Zip: \_\_\_\_\_  
 Type of Business: \_\_\_\_\_  
 Phone #: \_\_\_\_\_ Fax #: \_\_\_\_\_

**BROKER:** Paul M. League, QFP, CFP® (CA Insurance Lic.# 0610019)  
 LEAGUE FINANCIAL & INS. SERVICES  
 Address: [www.LeagueFinancial.com](http://www.LeagueFinancial.com)  
 Mailing Address: P.O. Box 11800, Palm Desert, CA 92255-1800  
 Phone Numbers: T: 800.482.5347 / F: 310.861.8466  
 E-Mail: Paul@LeagueFinancial.com

#1	#2	#3	#4	#5	#6	#7	#8	#8a	#9	#10	#11
EMPLOYEE'S NAME (Last name first)	S E X	DATE OF BIRTH	* SOCIAL SECURITY NUMBER	* MONTHLY SALARY	* HRS. PER WK.	* DATE OF HIRE	* OCCUPATION (Job Title)	% of Owner- ship (if any)	DEPENDENT STATUS # of Kids Spouse kids	COBRA EMPLOYEE (If YES, Give Start Date)	HOME ZIP CODE
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\* Only Columns 1 through 8a required for LTD, Section 125 Cafeteria Plans, 419, 412(i) & Pension Plans.

\* Please indicate "w/ or w/o bonus" at top of #5 under Monthly Salary. Salary should include all bonus compensation to obtain maximum LTD and Pension benefits.

> Home Zip Code, Column 11, required for HMO plans and individual/family non-group plans.

**NOTE:** Enclose copy of most recent billing from your current plan(s), and send copy of benefits booklets for proper comparison to existing benefits & rates.

X \_\_\_\_\_  
 Signature & Title of Preparer

\_\_\_\_\_  
 Date

Page #: \_\_\_\_\_ of: \_\_\_\_\_

**For Groups With 31 + Employees - Copy As Needed**