

COMPANY LETTERHEAD

DATE

OUTGOING PLAN ADMINISTRATOR

FIRM/COMPANY NAME

ADDRESS

CITY, STATE ZIP CODE

Re: Plan Name(s)

Gentlemen:

This letter will serve as notification that we are terminating your administrative services for the above referenced Plan(s), effective as of . Please be advised that Mr. Fred Harrison, of Professional Pension Planners, Inc., located at 1053 Saw Mill River Road, Suite 204, Ardsley, New York 10502 (914-693-1333) will be providing administrative services for my Plan(s).

You are hereby authorized to provide Professional Pension Planners, Inc. with any information that they may request, as well as copies of the following as soon as possible:

- 1. Copy of Plan and Trust with amendments.**
- 2. Internal Revenue Service Letter(s) of Approval**
- 3. Copy of most recent 5500 Series tax filings, including all Schedules.**
- 4. Most recent annual/actuarial report.**
- 5. Any correspondence covering current contributions.**
- 6. Plan to date contributions or amount available for hardship withdrawal.**
- 7. Contributions from inception**
- 8. Census of employees including date of birth, date of hire and salary earned.**
- 9. For all employees who have insurance, we need face amount of policy(s), premiums paid, cash values at retirement and cash values to date.**
- 10. Employee loan information.**
- 11. ERISA Fidelity Bond Information.**

Thank you for your prompt attention to this request. If you have any questions, please do not hesitate to contact Fred Harrison of Professional Pension Planners, Inc. or myself.

Very truly yours,

cc: Professional Pension Planners, Inc.