

# ASSOCIATED INDUSTRIES OF VERMONT

REPRESENTING THE VERMONT INDUSTRIAL AND BUSINESS COMMUNITY SINCE 1920

## Carney Antell and Future Planning Associates

### AIV Members Retirement Plan Solution

Get the help you need from experienced professionals

**Initial Plan Audit Workshop -- Wide Choice of Investment Providers**

**Creative Plan Design -- Accurate and Secure Plan Administration**

**Education and Counseling**

Phone (800) 639-3445 or email [tcarney@carneyantell.com](mailto:tcarney@carneyantell.com) for more information or complete this form and return it to AIV. All information is confidential and will be shared only with Carney Antell.

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

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You can use this form to open contact with Carney Antell and see what they can do for you. You can fax or mail the completed form to AIV at the address below, or contact Tim Carney directly as above.

Your Name: \_\_\_\_\_

Company Name: \_\_\_\_\_

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

Phone/Fax Number: \_\_\_\_\_

Description: \_\_\_\_\_

Employees: \_\_\_\_\_ NAICS/SIC Code: \_\_\_\_\_ Type (C-Corp, LLC, etc.): \_\_\_\_\_

Current Retirement Plan Type: \_\_\_\_\_

Current Retirement Plan Investment Platform: \_\_\_\_\_

Initial Questions or Areas of Interest: \_\_\_\_\_

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