

Is your company's 401(k) Plan giving you these headaches?

Complete our checklist and we'll show you how we can help!

- Frustrated** because owners are unable to contribute the maximum allowed! Instead, they pay income taxes at the highest brackets and slow down their retirement savings.
- Aggravated** because highly compensated (and highly valued) employees are receiving refunds because of testing failures.
- Confused** over why the plan must provide the same level of benefit for new and unproven employees as it does for long term and highly valued employees.
- Worried** that your service provider does not have in-depth legal and compliance knowledge... What is your exposure in a random IRS audit or Department of Labor investigation?
- Bewildered** that trusted advisors can't help you create more flexibility and control over your company contributions to your plan; business conditions change from year to year!
- Anxious** about the company contribution becoming increasingly expensive; what made sense when it was set up may not be the best fit now, aren't there other options?!

You are not alone in having these headaches!

These are common problems when using a common approach.

When you think about retirement plans – which may not be very often – “WOW!” is not likely the first word that comes to mind. However, our clients say this to us all the time. Our team of professionals, which include some of the brightest minds in retirement tax planning today, has developed a customized, IRS-approved 401(k) Plan design that specifically prioritizes the needs of successful business owners and partners in professional practices. (We do not sell investments**)**

[Submit](#) your name for a complimentary consultation and we'll redefine your expectations!