

BENEFITS OF A RETIREMENT PLAN

Setting up a plan and what to expect

Most people understand that they are responsible for their retirement nest-egg. Therefore, by setting up a workplace retirement plan you can help your employees save for their future and at the same time prepare for yours.

Offering a retirement plan benefit can help your business in more ways than one.



REDUCE CORPORATE TAXES

Employer contributions are tax-deductible

SECURE YOUR RETIREMENT

Plan, fund and save for your retirement future

RECRUIT, RETAIN AND REWARD EMPLOYEES

Must-have benefits to help attract top talent to your business

SETUP

We start by understanding your retirement plan objectives and create a custom plan design analysis that aligns with your business goals.

- + Discuss business goals for establishing a retirement plan
- + Partner with a retirement plan advisor
- + Select a recordkeeper
- + Sign setup documents
 - Plan document
 - Service Agreements
 - Recordkeeper documents

After the initial setup documents are complete, we host an onboarding conference call to clearly identify a timeline for setting up a plan and to answer any questions. For new plans, the process takes 4-6 weeks from the initial conversation to having a fully setup and operational retirement plan.

ON-GOING EXPERIENCE

For your on-going experience, Premier Plan Consultants will provide support and complete the following annual requirements:

- + Partner with you to offer a powerful company benefit
- + Be a resource for your questions
- + Review and monitor your retirement plan to ensure it is meeting employer needs as best as possible
- + Complete compliance testing requirements
- + Discuss your current plan design
- + Recommend updates and changes as company goals and/or demographics change
- + Review trust assets to ensure all assets are accounted for and in the correct accounts
- + File the required Form 5500

Today, businesses of any size can easily establish a 401(k) plan that is reasonably priced, simple to implement and requires little time to administer.

Offering a 401(k) plan not only helps your employees, but also helps your firm be more competitive in the marketplace.

401K
PROFIT SHARING
DEFINED BENEFIT
CASH BALANCE

Creating custom retirement plans for you, your employees and your business goals.



\$5,000
TAX CREDIT
FOR
3 YEARS¹

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¹ The tax credit is available for small businesses with fewer than 100 employees and it equals 50% of the cost to establish and administer a 401(k) or other qualified retirement savings plan, up to a maximum of \$500 per year for the first three years the plan is in effect.

Your retirement plan should not be set-it-and-forget, instead it should adapt with your business. At PPC, we will regularly discuss your retirement plan needs, so you are confident that you have the right plan for your business.