

Retirement plan specialists, serving the small business clients of tax attorneys, CPAs, securities brokers, financial planners, and other financial professionals.

Company Highlights

- Among nation's top administrators of retirement plans for small & medium-size businesses.
- Specializing in retirement plans for businesses with 1 to 500 employees.
- Provides actuarial services with an in-house staff of actuaries.
- Independent consultants, offering up-to-date, objective information regarding qualified retirement plan design options.
- Expert consultants, designing plans that serve as tax planning tools for owners, as well as a perk for employees.
- Regional sales and administrative offices throughout the U.S.

COMPANY OVERVIEW

SMALL BUSINESS RETIREMENT PLAN SPECIALISTS SINCE 1974

Our Company

Benetech, Inc. is one of the nation's largest independent actuarial consulting and pension administration firms, with regional offices throughout the U.S. It was founded with two fundamental goals in mind: to provide excellent recordkeeping services, and to do so with reasonable fees.

Our Services

- **Expert Plan Design & Administrative Services**
Our plan design and administrative services include an ongoing commitment to effective communication with clients and their advisors. Each client is assigned a trained consultant.
- **Free Consulting Services**
We provide free consulting services to prospective clients, including a feasibility study of the employer's plan design options. Feasibility studies illustrate plan specifications, contributions, and benefit projections, and are prepared to help the business and its advisors decide on the appropriate plan for the company.
- **Regional Consultants Available**
Local Benetech Consultants are available to provide presentation services nationwide. At no cost or obligation, our Consultants can meet with prospective clients and their advisors to clearly present plan options and benefits, and to answer questions.

New Opportunities for Business Owners

Recent tax law changes were intended to make retirement plan sponsorship more appealing to business owners. There are excellent new opportunities for owners to accelerate retirement savings and defer taxes. These opportunities include:

- **"Owner-Only" Defined Benefit Plan:** Annual contributions as high as \$200,000.
- **Tiered Safe-Harbor 401(k) Plan:** Target owners and other key employees with higher allocation rates.
- **Add a Cash Balance DB Plan to a 401(k) Plan:** Supercharge an existing 401(k) Plan by adding a Cash Balance Defined Benefit Plan.

Next Step: A Free Proposal

For a free contribution illustration of a business's retirement plan options, contact your local Benetech specialist, or call our consulting department at 800-285-7526.