

Synopsis

Retirement Plan Engineering

This presentation will discuss the planning process a retirement plan consultant or financial planner goes through to decide on the most effective and most appropriate plan design for a business. These steps will include:

- Plans primarily focused on business owners and the tax advantages of qualified retirement plans
- Plans primarily focused on employee benefits and retirement readiness for corporate retirement plans
- Appropriate employee demographics for each type of plan
- An overview and illustrations of 401(k), cross-tested profit sharing, defined benefit pension and cash balance pension plans.

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