



Does your company have additional funds to invest?

Ideally your company should be making a profit and have a general expectation of future profits. While there are design options we can assist with to provide flexibility in contributions year to year, these plans are a commitment that will require additional contributions .

Does your company currently contribute less than 6% of earnings into a defined contribution (profit sharing) plan?

Employer contributions (not your individual deferrals) to a defined contribution plan need to be no more than 6% before adopting a pension plan to take advantage of the tax savings.

What information do you need to provide?

In order for us to start, all we need is basic demographic information for all employees (date of birth and current salary) as well as your target annual contribution amount.