

# Convert Tax Dollars into Retirement Savings

ACCRETIVE



WEALTH

**Accretive Wealth Management** can help business owners set aside more for retirement while reducing tax liabilities. We combine our experience in financial planning and portfolio management with our partner's 40+ years of experience in pension planning for companies all over the country.

**Strategy:**

Create plans to increase retirement savings and decrease current-year tax liabilities.

**Data gathering:**

Information about employees, which includes: name, date of birth, date of hire, date of termination, total compensation and number of hours worked.

**Preparation:**

Once we receive the information, we will begin evaluating all options that meet government regulations.

**Customized plan design:**

Our plan design specialists will create an illustration to show how much the firm would be able to put in retirement plans, how much this would reduce current taxes, and how much the owners and employees would benefit from our plan.

**Execution:**

When the owner has selected and approved the plan, we will initiate the documents that the owner will review and sign. Once the plan is live, we will make a presentation to all employees.

# Many Tools Available to Help You Decrease Tax Liabilities and Increase Retirement Savings





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