



DO YOU HAVE BUSINESS-OWNING
CLIENTS WHO WANT TO
Pay Less in Taxes?

**Do they make more
than \$500,000/year?**

**Do they want to contribute
more than \$100,000/yr to
tax-deductible qualified plans?**

**If you answered "yes" to each question,
Let's Connect.**

**SCHEDULE A
CONSULTATION TODAY.**

[Name]

[Email]

[Phone]



CASH BALANCE PLAN Tax Savings Estimator

Business Owner's Age	Sample Deductible Contribution to a Cash Balance Plan	Estimated Federal & State Income Tax Savings
Age 60	\$334,000	\$132,000
Age 50	\$272,000	\$108,000
Age 40	\$165,000	\$65,000
Age 30	\$101,000	\$42,000

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