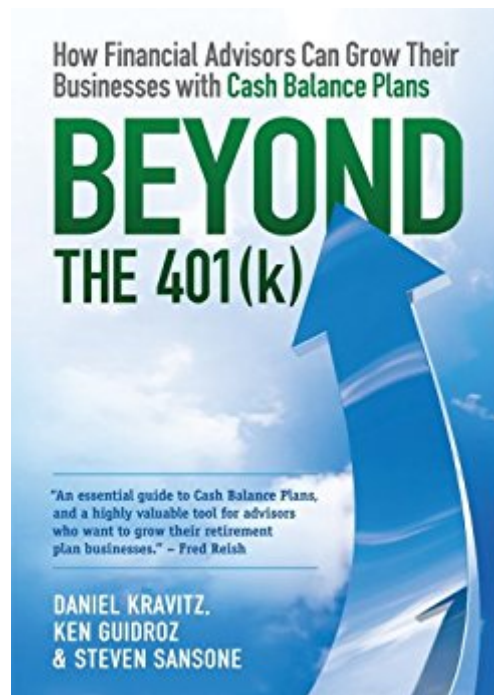




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# Beyond The 401k: How Financial Advisors Can Grow Their Businesses With Cash Balance Plans



## Synopsis

A complete step-by-step guide to help financial advisors and retirement plan professionals gain a competitive edge using Cash Balance Plans. Considered the retirement industry's best kept secret, these unique tax-favored hybrid plans combine the high contribution limits of defined benefit plans with the flexibility and portability of 401(k)s. The authors are part of the expert team at Kravitz, the national leader in Cash Balance Plan design, management and administration. This accessible, highly readable book explains all the essentials of these complex tax-qualified plans. Supported by case studies, checklists, charts and diagrams, the book shows exactly how Cash Balance Plans can take business owners beyond the 401(k) to accelerate retirement savings, reduce taxes, and deliver better benefits for employees.

## Book Information

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## Customer Reviews

I really love this book. I read it once cover to cover and am going back through it to try to really engrave it in my memory. It is the most understandable, readable explanation of Cash Balance plans that I have ever seen.If you are a professional service provider, sole proprietor, or other high

earning individual frustrated by the low limits on your tax deductible contributions your defined contribution plan, READ THIS BOOK! If you are an investment advisor for retirement plans, a CPA providing tax and business planning advice, a TPA for retirement plans, or another professional involved with retirement plans, you can't afford NOT to read this book. If you are a retirement plan actuary, you may know what's in this book. But you won't know how to explain it in any language that the average person can understand - so GET THIS BOOK! Kudos to the authors for making Cash Balance plans accessible to thousands of people, directly or indirectly, and making the dream of retiring more accessible to all.

If you are in the Retirement Planning industry in any way, you should read this book! It explains the basic concepts of the most common retirement plans and the gap where additional help is really needed and how you as an advisor can fill that spot. It's well written, laid out great, and easy to understand.

Excellent book providing a comprehensive description of Cash Balance Plans and the benefits of introducing this option to clients. Gave me a good understanding of how to position the plan in conjunction with other retirement solutions.

Great book to help learn about Cash Balance plans. Very helpful in breaking it down into small, bite sized chunks.

Excellent source in my business of finance. Great for educating the participants of 401(k)s. Learned how to keep things simple when explaining these vehicles along with comparisons.

Excellent, experienced information that covers the nuts and bolts and marketing advantages. Smooth read.

Exactly what I expected. Thanks

Good start to a very interesting but extremely complicated topic.

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Cash Balance Combos: A Practical Guide for Understanding and Operating Cash Balance/Defined

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