

## A SIMPLE Solution for Small Businesses



A SIMPLE IRA makes it easy for small businesses to provide a retirement plan for their employees. These low-maintenance plans are inexpensive and straightforward to set up. Best of all, they are easy to understand!

- No cost to establish
- No government forms to file
- No annual reporting
- No non-discrimination testing
- Pre-tax salary deferrals (including catch-up contributions)
- Mandatory employer match of dollar for dollar up to 3% of compensation or 2% non-elective contribution
- Reduced matching contribution is available in 2 out of 5 years
- Tax-deferred account growth
- Minimal employer involvement
- Up to 2-year waiting period
- Free illustration and comparison reports

Let us help you make your small business clients' retirement SIMPLE.

### **Order your materials today**

Fill out the form below to receive the installation and/or enrollment booklets.

## RELATED PRODUCTS

- [Advisor Mutual Fund Program](#)

## SALES RESOURCES

- [SIMPLE IRA Fact Sheet \(PDF\)](#)
- [SIMPLE IRA Brochure \(PDF\)](#)
- [SIMPLE IRA Direct Mail Postcard \(PDF\)](#)
- [Retirement Plan Solutions for Small Business Brochure \(PDF\)](#)

## SIMPLE IRA FAQs

- [SIMPLE IRA FAQs Overview](#)
- [Establishing SIMPLE IRAs FAQs](#)
- [Contributing to SIMPLE IRAs FAQs](#)
- [SIMPLE IRA Rollovers and Distributions FAQs](#)

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