

## Solo 401(k)



401(k) for Self-employed Individuals

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**Open More Doors and Grow Your  
Small Business Retirement Practice**

**Give small business owners the chance to save for retirement in a way previously available only to corporate America.**

**The Security Benefit Solo 401(k) plan gives financial professionals a simple way to offer a flexible retirement option for the self-employed business owner, including:**

- Easy set up and maintenance
- Bundled administration and recordkeeping
- No proprietary funds
- Owner and spouse in same plan
- Mobile app for clients



<sup>1</sup> U.S. Small Business Administration, Office of Advocacy, 2023 Small Business Profile, Nov. 2023.  
The SBA Office of Advocacy defines small businesses as firms with fewer than 500 employees.

**Our Solo 401(k) can provide the following opportunities to small business owners:**

- Maximum business deductions
- Generous contribution limits
- Contributions can be made as Roth after-tax deferrals
- Accepts rollovers from other retirement savings plans, such as an IRA, SEP, or a previous employer’s 401(k) plan
- Small business owners can contribute both as the employee and the employer

**Do you know a small business owner in your community who is thinking about starting a retirement plan?**

A Solo 401(k) plan can open more doors by providing a solution to help your self-employed clients feel more confident about their own retirement, and it can provide you with another way to grow your practice.

### Want to learn more?

Complete the form below to download marketing materials that can help you reach potential small business clients and educate them on the benefits of a Solo 401(k) retirement plan.

## Solo 401(k) FAQs

- [Solo 401\(k\) Overview](#)
- [Establishing a Solo 401\(k\)](#)
- [Contributing to a Solo 401\(k\)](#)
- [Rollovers and Distributions](#)

## Related Resources

- [SecurePoint Retirement Program](#)
- [Small Business Plans](#)
- [Maximum Contribution Calculator](#)

**FINANCIAL PROFESSIONAL USE ONLY — NOT FOR USE WITH CONSUMERS**

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