

Ideal Candidates for Cash Balance Plans



1. Principals seeking a tax deduction of more than \$50,000 or making more than \$250,000 per year
2. Highly profitable companies of all types and sizes
3. Successful family businesses and closely held businesses
4. CPA and law firms, medical groups and professional firms
5. Older owners who need to squeeze 20 years of retirement saving into 10

Call for a free consultation to learn more about the advantages of a Cash Balance Plan



TRA

The Retirement *Advantage*

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2017 Maximum Contribution Limits 401(k), Profit Sharing & Cash Balance Plans

Age	401(k) Only	401(k) with Profit Sharing	Cash Balance	Total
60 – 65	\$24,000	\$60,000	\$256,000	\$316,000
55 – 59	\$24,000	\$60,000	\$206,000	\$266,000
50 – 54	\$24,000	\$60,000	\$157,000	\$217,000
45 – 49	\$18,000	\$54,000	\$120,000	\$174,000
40 – 44	\$18,000	\$54,000	\$92,000	\$146,000
35 – 39	\$18,000	\$54,000	\$70,000	\$124,000
30 – 34	\$18,000	\$54,000	\$54,000	\$108,000

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