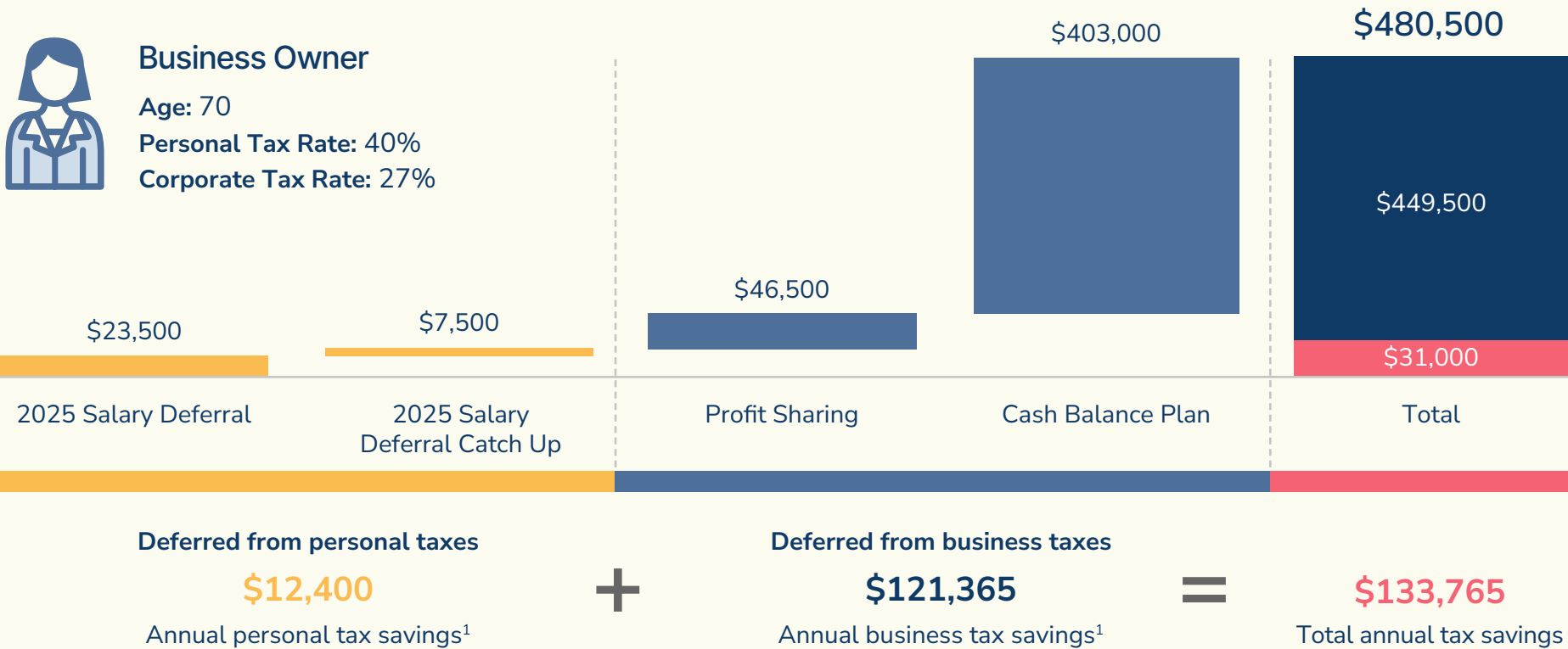


Case Study

In the case study below, a business owner saves \$480,500 in one year for retirement while also saving \$134,000 on taxes. In essence, **tax savings funded about a quarter of the retirement contribution!**



¹Based on a 70-year-old business owner putting away \$23,500 in individual contribution, \$7,500 as a catch-up contribution, \$46,500 as Profit Sharing, and \$403,000 as Cash Balance per 2025 contribution limits. Savings are tax-deferred until withdrawn in retirement.

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