

WINNIE SUN

WEALTH WHISPERER

FINANCIAL PLANNING FOR CREATIVES

SUN GROUP offers retirement plans for businesses of any size.

	INDIVIDUAL 401(K)	SEP-IRA	SIMPLE IRA	PERSONAL DEFINED BENEFIT PLAN	BUSINESS 401(K) PLAN
WHO IS IT FOR?	Owner only business (no employees)	Owner-only business with a few employees	Business with up to 100 employees	Owner-only business or up to 5 employees	Businesses of any size
KEY FEATURES:	<ul style="list-style-type: none">-All the benefits of a traditional 401 (k)-High contribution limits-Ability to make profit-sharing contributions and salary deferrals-Easy to administer	<ul style="list-style-type: none">-No IRS reporting-Allows for contributions for you and any employees-Easy to administer-High contributions for owner-Tax deferred earnings	<ul style="list-style-type: none">-Primarily funded with employee salary-deferral contributions-Employer- matched contributions up to 3%-An easy plan to administer-Business expense deductions for employee contributions	<ul style="list-style-type: none">-Highest contribution limit-Contributions are generally 100% tax-deductible-Helps target your desired level of income in retirement-A customized funding proposal	<ul style="list-style-type: none">-Permits a higher level of salary deferrals by employees than other plans-Optional employer-matched contributions-Greater plan customization-Business tax advantages

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