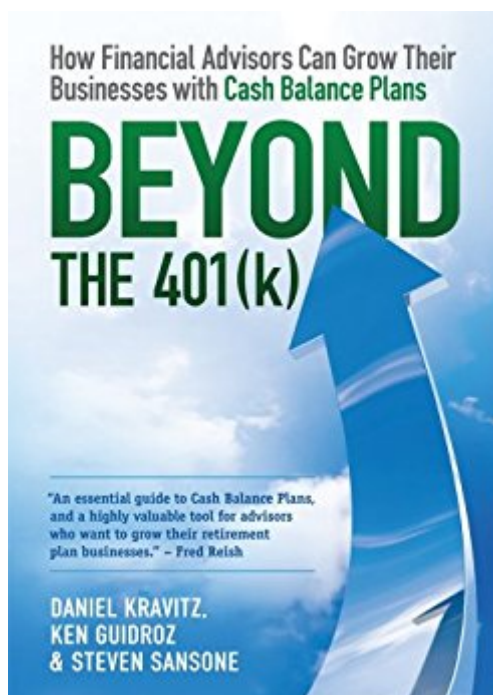


The book was found

Beyond The 401k: How Financial Advisors Can Grow Their Businesses With Cash Balance Plans



Synopsis

A complete step-by-step guide to help financial advisors and retirement plan professionals gain a competitive edge using Cash Balance Plans. Considered the retirement industry's best kept secret, these unique tax-favored hybrid plans combine the high contribution limits of defined benefit plans with the flexibility and portability of 401(k)s. The authors are part of the expert team at Kravitz, the national leader in Cash Balance Plan design, management and administration. This accessible, highly readable book explains all the essentials of these complex tax-qualified plans. Supported by case studies, checklists, charts and diagrams, the book shows exactly how Cash Balance Plans can take business owners beyond the 401(k) to accelerate retirement savings, reduce taxes, and deliver better benefits for employees.

Book Information

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Customer Reviews

I really love this book. I read it once cover to cover and am going back through it to try to really engrave it in my memory. It is the most understandable, readable explanation of Cash Balance plans that I have ever seen. If you are a professional service provider, sole proprietor, or other high

earning individual frustrated by the low limits on your tax deductible contributions your defined contribution plan, **READ THIS BOOK!** If you are an investment advisor for retirement plans, a CPA providing tax and business planning advice, a TPA for retirement plans, or another professional involved with retirement plans, you can't afford NOT to read this book. If you are a retirement plan actuary, you may know what's in this book. But you won't know how to explain it in any language that the average person can understand - so **GET THIS BOOK!** Kudos to the authors for making Cash Balance plans accessible to thousands of people, directly or indirectly, and making the dream of retiring more accessible to all.

Beyond the 401(k) is a must read for all Financial Advisors and Retirement Plan Consultants that are looking to take their business to the next level. Dan Kravitz and his team will teach you how to utilize the Cash Balance plan to help your clients achieve maximum tax deductions and their employees maximize their retirement outcomes. I highly recommend this book.

The first day I met co-author Dan Kravitz, he provided me with a copy of this book. I picked it up that evening and had a difficult time putting it down. The authors did a masterful job of taking a technical (but very cool) concept and presenting it in a way that was engaging and easy to understand. In my role as an executive compensation consultant, I began to think of countless organizations that could benefit from Cash Balance Plans as a tax advantaged vehicle for capital accumulation. I have already spoken to many of our clients and professional associates about the benefits of CBPs, as well as the Kravitz Organization as a "top notch" provider.

This is a must read and great resource for benefit consultants who are dedicated to delivering optimal solutions and value to their clients. For those companies who fit the cash balance profile, it's an excellent vehicle to mitigate taxes and improve retirement outcomes.

I loved it and an easy read. They were able to make an otherwise difficult concept easy to understand! I read many articles and still didn't get the gist of these plans until I read this book. Very well done and recommended to anyone wishing to increase their knowledge of this "hybrid" plan.

Great read for helping advisors understand how to **MAX OUT** an owner above the standard \$52k limits in just a 401k/Profit Sharing Plan.

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HOW TO MAKE SOME CASH WITHIN A COUPLE OF HOURS, TODAY, NOW: (make money,easy cash, fast cash,selling,sell,goods,facebook) Rich Dad Advisors: Buying and Selling a Business: How You Can Win in the Business Quadrant (Rich Dad's Advisors (Audio)) Off Balance: Getting Beyond the Work-Life Balance Myth to Personal and Professional Satisfaction Basement Home Plans: 100 Home Plans That Grow with You Taxes & Accounting for Small Businesses - QuickStart Guides: The Simplified Beginner's Guides to Taxes & Accounting for Small Businesses 422 Tax Deductions for Businesses and Self-Employed Individuals (475 Tax Deductions for Businesses & Self-Employed Individuals) Gratitude Marketing: How You Can Create Clients For Life By Using 33 Simple Secrets From Successful Financial Advisors Clinton Cash: The Untold Story of How and Why Foreign Governments and Businesses Helped Make Bill and Hillary Rich Rich Dad Advisors: Writing Winning Business Plans: How to Prepare a Business Plan That Investors Will Want to Read - and Invest In Investing: How to Generate Wealth in Today's Market: An Investor's Guide to: Stocks, Bonds, Commodities, Futures, Mutual Funds, Options and your 401K Financial Aid for Veterans, Military Personnel, and Their Families, 2012-2014 (Financial Aid for Veterans, Military Personnel and Their Dependents) Financial Aid for Persons with Disabilities and Their Families 2012-2014 (Financial Aid for the Disabled and Their Families) House of Cash: The Legacies of My Father, Johnny Cash No Cash? No Problem!: Learn How To Get Everything You Want in Business and Life, Without Using Cash Cash Value Maximizer: How To Get The Highest Actual Cash Value For Your Vehicle In Less Than Two Hours The War on Cash: How Governments, Banks, Nonprofits and Academics are Abolishing Cash How to Read a Balance Sheet: The Bottom Line on What You Need to Know about Cash Flow, Assets, Debt, Equity, Profit...and How It all Comes Together Balance and Calm: Adult Coloring Book Art Therapy for Grownups (Adult Coloring Books, Balance Coloring Book, Calm Coloring Book) (Volume 1)

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