



SECURITY BENEFIT

A SIMPLE Solution for a Small Business

SIMPLE IRA PLAN

 Security Benefit®
TO AND THROUGH RETIREMENT

SIMPLE IRA plans can be a good option for a retirement program for many small businesses.

1. Security Benefit provides both implementation materials and a variety of investment options
2. Investment menu with 30+ asset classes, 30+ mutual fund companies, and 140+ mutual funds including active, passive, and target date options
3. Minimal employer involvement required
4. Pre-tax salary deferrals up to \$20,000 (includes Age 50+ catch-up contribution*)
5. Low-maintenance
6. Employer match of dollar-for-dollar or non-elective contribution

Call me today to get a free illustration. I can show you how a SIMPLE IRA is easy to set up and easy to understand.

* SIMPLE IRA catch-up limits will increase to \$5,000 or 150% of the regular catch-up limit (whichever is greater) for participants aged 60-63. This limit will be \$5,250 for 2025.

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