

A SIMPLE Solution for Small Businesses

A SIMPLE IRA is a low-maintenance, inexpensive and straightforward retirement plan. Best of all, they are easy to understand!



Key Features

- No cost to establish
- No government forms to file
- No annual reporting
- No non-discrimination testing
- Pre-tax salary deferrals (including catch-up contributions)
- Mandatory employer match of dollar for dollar up to 3% of compensation or 2% non-elective contribution
- Reduced matching contribution is available in 2 out of 5 years
- Tax-deferred account growth
- Minimal employer involvement
- Up to 2-year waiting period
- Free illustration and comparison reports

Let us help you make your small business clients' retirement SIMPLE.

Want to learn more?

Complete the form below to download marketing materials that can help you reach potential clients and educate them on the benefits of a SIMPLE IRA retirement plan.

Related RESOURCES

- [Advisor Mutual Fund Program](#)
- [Solo 401\(k\)](#)
- [SEP IRA](#)
- [Small Business Solutions](#)

SIMPLE IRA FAQs

- [SIMPLE IRA FAQs Overview](#)
- [Establishing SIMPLE IRAs FAQs](#)
- [Contributing to SIMPLE IRAs FAQs](#)
- [SIMPLE IRA Rollovers and Distributions FAQs](#)

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