



# We Help Advisors **Gather Assets Faster**

**Dedicated Defined Benefit Services** supports high income clients and their Financial Advisors nationwide in the sale and servicing of Defined Benefit (DB) retirement plans. These IRS-approved plans potentially allow the largest tax deductions with annual plan contributions of \$100,000+ for high income Independent Professionals, Small Business Owners & Individuals with Self-employment Income.

## Our distribution partners and retirement plan results speak to our success.

In a recent advisor study conducted by Dedicated DB:

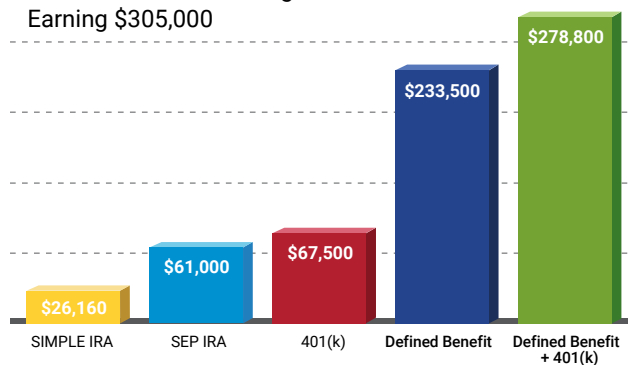
- Over 75% of the Wealth Managers and Financial Advisors working with Dedicated DB had never opened a Defined Benefit plan before.
- Over 91% said they were completely satisfied or satisfied with opening a DB plan with Dedicated DB.
- Almost half felt they had additional existing clients who could benefit from a DB plan.

Trusted by leading financial services companies such as, OppenheimerFunds, Transamerica, Raymond James, TD Ameritrade, Wells Fargo, and hundreds of independent RIAs, Dedicated DB has opened over 4,500 plans for 1-10 person firms. Advisors value Dedicated DB's open investment platform that allows them total control over investment strategy.

**Dedicated Defined Benefit Services** is completely focused on helping Wealth Managers, Financial Advisors and CPAs penetrate the highly desirable retirement market with a unique asset-gathering approach and product model. Our innovative turnkey Defined Benefit program integrates marketing, sales and service delivery. We equip Advisors to identify and win qualified clients for these \$1-2.7 Million new asset accounts.

### Retirement Plan Savings Limits\*

For a Business Owner Age 52  
 Earning \$305,000



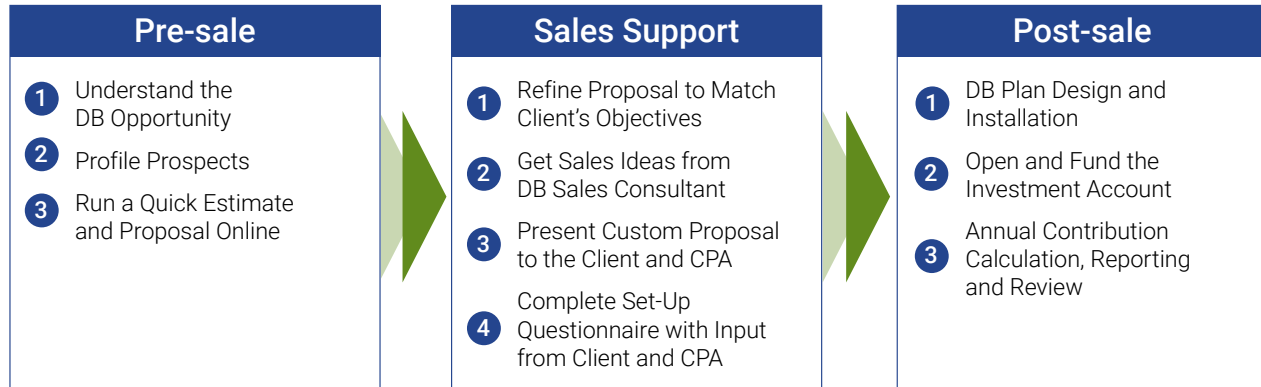
In many cases the DB can be paired with a 401(k) allowing even higher annual contributions and greater flexibility.

\*2022 plan maximum contributions for a 52 year-old earning \$305,000 in W-2 income, including "catch-up" contribution of \$6,500 for a 401(k) and \$3,000 for a SIMPLE IRA.

## We are the Advisors' DB Experts and Support Team

For over a decade, our proven sales and service support system has empowered Advisors to prospect, qualify and sell a Defined Benefit retirement plan solution to attract new and deepen relationships with existing clients: high income self-employed and small business owners. Our online communications, quick proposal tools and, most importantly, expert plan design and consulting by phone, give Advisors the edge to succeed in this market.

Advisors who work with us move smoothly through a proven sales process that delivers results for them and their clients.



## Our Management Team and Plan Consultants Deliver Value

**Dedicated DB's** senior management combines almost a century of success working in and servicing America's top Financial Services firms. We bring unique expertise in product design, sales and marketing, and third party administration, providing a top-tier professional service organization. Because we shaped our company from the ground up, focusing on advisor support and the unique tax and retirement needs of high income clients, our program is cost-effective and high value.

Our **IRS-approved** prototype **plan** document, including a two-page Adoption Agreement is easy for a client to understand. All costs are transparent, with no asset-based fees. As a result, we create no 408(b)(2) disclosure requirements. There are no system integration requirements. Our highly trained and experienced consultants are dedicated to both Advisors and their clients, responding quickly and competently to their needs. And the result: in a recent client satisfaction survey, 96% of our clients said they would recommend a DB and Dedicated Defined Benefit Services to colleagues or other self-employed/small business owners.

## We Help Advisors Create a Competitive Advantage

**Dedicated Defined Benefit Services** is dedicated to the success of Advisors in the highly competitive retirement planning arena. 401(k)s and SEPs simply do not meet the needs of self-employed and small business owners in their peak earning years. Less than 10% of Advisors currently sell DB plans. Partnering with Dedicated DB provides the resources Advisors need to differentiate themselves and maximize their clients' retirement wealth with complete confidence.

"I would recommend you (and have) to anyone seeking to start or move a defined benefit plan."

— Client, Independent Professional

Contact Us Today to Create a Solution for You:



24 x 7 on-line web support at [www.Dedicated-DB.com](http://www.Dedicated-DB.com)



Live sales support via phone **866-269-2706** • 10:00 AM to 8:00 PM EST



24 hour email reply [DBPlans@dedicated-db.com](mailto:DBPlans@dedicated-db.com)

