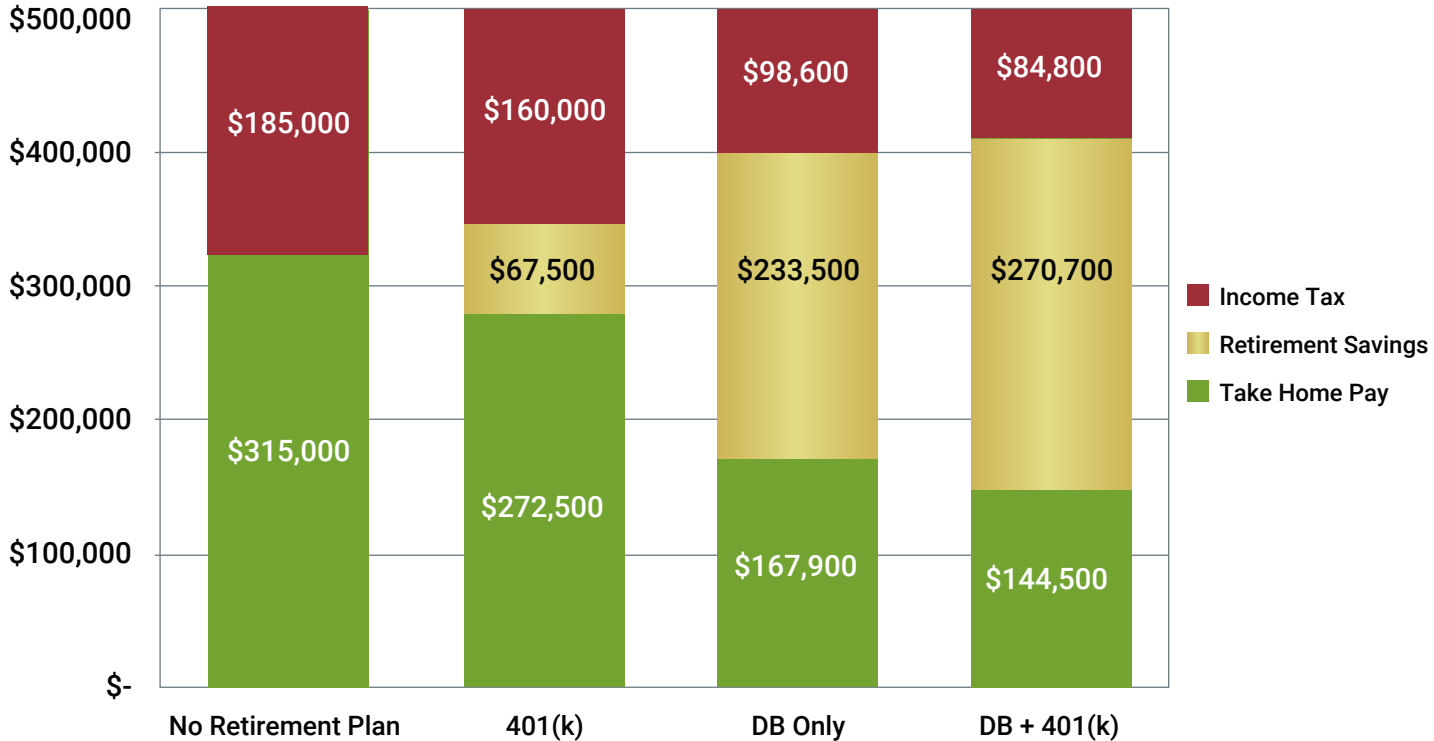


Retirement Plan Impact on Tax Liability 2022

Example: a 52-year-old sole proprietor with annual income of \$500,000

Having a DB + 401(k) plan drops his tax liability from \$185,000 to \$84,800.*

He retains \$415,200 for current and future use. His advisor adds \$270,700 to AUM.



*Based on earned income; assumes estimated 31% federal and 6% state tax rates. This example is based on specific assumptions and is used for illustrative purposes only.

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