

At SVA Plumb Financial we work with successful business owners to help maximize your retirement benefits. We take a comprehensive approach to finding the best retirement plan solutions for you and your organization. It's basically a three-step process based on your goals as a business owner and an employer. It starts with evaluating the appropriate plan census data, including age and wage demographics. This helps determine the options that are available to you. This leads to the appropriate reviewing, the appropriate plan alternatives which may include, a Roth 401k, an integrated profit sharing plan, a safe harbor plan, or even a cash balance plan if that's appropriate for you. Finally, we recommend the optimal retirement plan solution based on your unique facts and circumstances