

Now's the Time to Launch a Retirement Plan



Take Advantage of **\$16,500*** in SECURE Act Tax Credits

To increase access to workplace retirement accounts, the new SECURE (Setting Every Community Up for Retirement Enhancement) Act incentivizes employers to offer retirement plans for employees through an expanded tax credit to offset start-up costs.

Under the Act, the tax credit for adopting a new qualified plan rises to a max of \$5,000 annually for three years. PLUS if a plan features automatic enrollment, employers can claim an additional credit of up to \$500** for three years.

*May be limited based on plan participation

**This credit is also available to employers who convert their existing plan to an automatic enrollment design

Here's what you need to know to take advantage of the credit:

Covered Employers

The credit is available to employers with up to 100 employees.

When It Applies

Employers may claim the credit for up to the first three years the plan is in effect.

Applicable Plans

401(k), and profit sharing types of plans are all eligible for the credit under the Act.

Thinking about starting a plan? We can help.

Our streamlined, full-service recordkeeping and administration service combined with a wide array of high quality investment options makes CompleteK the highest valued retirement program in the marketplace today.



The CompleteK Difference

- Affordable Administration Services
- Open Architecture/Multiple Fund Families
- Low-Cost Mutual Funds
- No Hidden Costs
- 401(k)/Profit Sharing/New Comparability Plans
- Integrated Contribution Processing