

# Case Study

In the case study below, a business owner saved \$407K in one year for retirement while also saving \$136K on taxes. In essence, **tax savings funded nearly a one-third of the retirement contribution!**

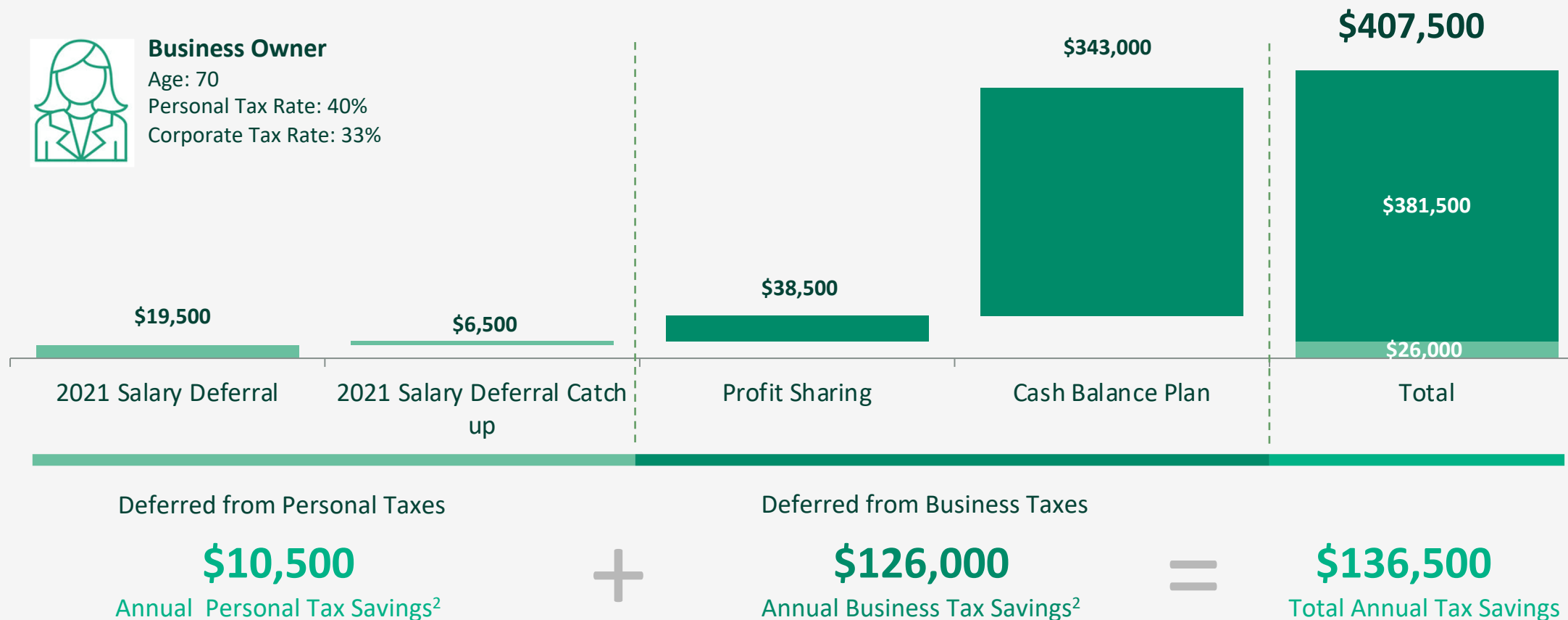


## Business Owner

Age: 70

Personal Tax Rate: 40%

Corporate Tax Rate: 33%



<sup>1</sup>~10% of eligible employee compensation given as Safe Harbor & Profit Sharing contributions

<sup>2</sup> Savings are tax-deferred until withdrawn in retirement.