

Retirement Plan Services

Retirement Plan Solutions Tailored to Fit Your Business



A Plan Tailored to Your Needs

Designing an ideal retirement plan for your business begins with defining your goals, and factoring in all that makes your business unique, from your ownership structure and financial situation, to your retirement time horizon.

Our Retirement Plan Services team works with business owners who want to ensure that they and their employees have an accessible and cost efficient way to save for retirement. Our expert industry knowledge makes us an ideal partner for a variety of small businesses and industries.

An Integrated Retirement, Tax, and Investment Team

Our Retirement Plan Services team provides retirement plan design, setup and administration, Department of Labor (DOL) assistance, tax planning, and consulting services all under one roof. Each team member has specific industry knowledge and expert advice that can help you take your plan to its full potential.

Proactive, Year-Round Guidance

We stay in close communication throughout the year to make sure that your plan design is maximizing contribution opportunities. As changes come up, our proactive team provides support and guidance for both the management team and employees.

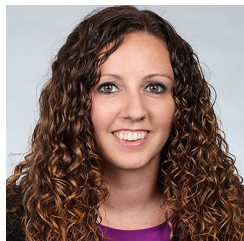
JONES & ROTH RETIREMENT PLAN SERVICES TEAM:



Mark Reynolds, CPA*
Partner & Shareholder



Cheryl Opperman, QPA
Retirement
Plan Consultant



Danielle Hernandez, QPA
Retirement
Plan Administrator

WE PROVIDE:

Custom Plan Design & Documents

We design your plan specifically for you & your business and draft documents in-house for easier updates

Year-Round Consulting

Support and guidance for both the management team and employees

Contribution Projections & Tax Planning

Making sure you maximize both your benefits & tax credits

Plan Administration, Compliance & Form 5500

An expert team to ensure timeliness and accuracy

Integrated Retirement Plan & Investment Strategy

Helping you maximize your personal financial opportunity

*Securities offered through Avantax Investment ServicesSM, Member FINRA, SIPC. Investment advisory services offered through Avantax Advisory ServicesSM. Insurance services offered through an Avantax affiliated insurance agency.