TAX EFFICIENT SOLUTIONS
Creating An Arbitrage

Fort Lauderdale, FL 33301
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FOR CPAS, RIAS & ESTATE ATTORNEYS

Is a Defined Benefit Pension Plan right for your client?

At Tax Efficient Solutions, we can maximize your clients' current tax deduction while helping them meet their retirement and financial planning goals.

We understand that each person's lifestyle is unique and requires distinct consideration and thoughtful planning.

CONTACT US

What is a Defined Benefit Plan?

A Defined Benefit pension plan offers guaranteed retirement benefits for employees. Largely funded by employers, with retirement payouts based on a set formula that considers an employee's salary, age, and tenure with the company.

How does a Defined Benefit Plan work?

Defined Benefit Plans offer guaranteed, salary-like payments and are a qualified employer-sponsored retirement plan. Employers qualify for certain tax benefits under the law, like tax-deferred investment growth or deductions for contributions. Each year, pension actuaries calculate the future benefits projected to be paid from the plan, and determine what amount, if any, needs to be contributed to fund that projected payout.

"The people we work with benefit from our team's expertise, skillful advice, and genuine service. We place you at the center of everything we do — with skillful advice, personal service, deep experience, and strong fundamentals in financial planning strategies."

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EXPLORE FURTHER

Defined Benefits Pension Plans →

How Do Defined Benefits Pension Plans Work? →

Advantages Offered by Defined Benefit Plans →

SCHEDULE A FREE STRATEGY SESSION