



# Retirement Plan Comparison Chart



		Solo(k) with Fisher Investments	401(k) with Fisher Investments	SIMPLE IRA with Fisher Investments	SEP IRA with Fisher Investments
 <b>Contributions</b>	Employee income limits	None	None	None	None
	Annual Contribution Maximum	\$57K <sup>1</sup>	\$57K <sup>1</sup>	\$13.5K	\$57K
	Incremental Owner Contributions Available	Yes <sup>2</sup>	Yes <sup>2</sup>	No	Yes <sup>2</sup>
	Tax-Deferred Contributions	Pre-tax & Post-tax options	Pre-tax & Post-tax options	Pre-tax only	Pre-tax only
	Employer Contributions	Optional	Optional	Required (100% match up to 3%)	Required (Same % as owner)
	Loans Allowed	Yes	Yes	No	No
 <b>Plan Management</b>	Cost	Low Cost	Low Cost	Low Cost	Low Cost
	Administration	Easy to start and maintain	Easiest to start and maintain	Easy to start and maintain	Easy to start and maintain
	Employee Exclusions	N/A	Yes	No	No

<sup>1</sup>\$63,500 if over age 50. <sup>2</sup>Up to \$356,500 annually via a cash balance plan.