

Retirement Services

Solo 401(k)



As a financial advisor, guiding your self-employed clients toward a secure retirement is paramount. A Solo 401(k) plan offers a robust solution for business owners without employees, providing significant tax advantages and high contribution limits. Partnering with Freedom Advisors enhances this offering, delivering a seamless experience through our advanced platform and integration with custodians like Goldman Sachs, Schwab and Fidelity.

Why Recommend a Solo 401(k)?



Maximized Contributions

Clients can contribute both as employees and employers, allowing for higher total contributions compared to other retirement plans.



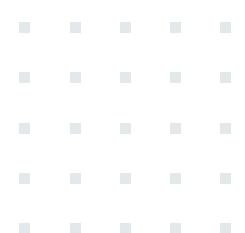
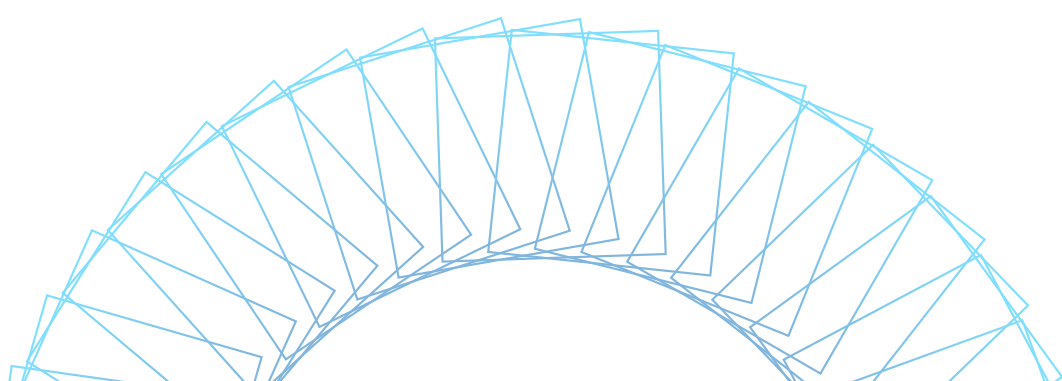
Tax Advantages

Qualified contributions are tax-deferred, reducing taxable income in the contribution year.



Flexible Investment Options

Solo 401(k)s offer a wide range of investment choices, enabling you to tailor portfolios to specific client retirement goals.



The Freedom Advisors Advantage

Our platform is designed to simplify the management of Solo 401(k) plans for both advisors and clients:



Comprehensive Portfolio Management

Access over 600 model portfolios from 100 money managers, ensuring diversified investment strategies tailored to client needs.



Advanced Technology Platform

Our intuitive interface allows for efficient monitoring and management of client portfolios, freeing your time for client advisory work.



Expert Support

Leverage our team of experienced professionals for administrative assistance and practice optimization, ensuring you can deliver exceptional client service.

Seamless Custodial Integration

We support custodial services through Goldman Sachs, Schwab and Fidelity, providing flexibility and reliability in asset management and safekeeping at trusted institutions.

**Goldman
Sachs**

charles
SCHWAB



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Empower Your Clients Today

Many of your business-owner clients can significantly benefit from a Solo 401(k) plan. By partnering with Freedom Advisors, you can offer a streamlined, efficient, and effective retirement solution that aligns with client financial goals.



Contact us to learn more about how we can assist you in delivering exceptional retirement planning services.



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