

## Solo(k) Offering Available with Roth and Loan Options



### Retirement Plans for Your Business Owner Clients

Axos Advisor Services offers flexible retirement solutions to help grow and diversify your business owner client offerings. From one-person sole proprietor plans to large, audited group plans, we have the account types to meet your clients' needs.

What we offer:

- Solo(k)
  - Axos Advisor Services provides a self-trusted Solo(k) plan for sole proprietors and partners with no employees.
- Savings Incentive Match Plan (Simple IRA)
  - Gives small business owners and their employees a way to build retirement savings without the tax reporting requirements of traditional 401(k)s.
- Simplified Employee Pension Plan (SEP IRA)
  - Allows small business owners to obtain tax-advantaged savings for themselves and to contribute for their employees as well.
- Custody only accounts with or without tax reporting
- Full-service solutions for group plans
  - Recordkeeping
  - Third-party administration
  - Payroll integration
  - Comprehensive fiduciary support services

Let's talk about what we can do for your business!

Contact your client service advocate or email us at [Retirementsolutions@Axosadvisorservices.com](mailto:Retirementsolutions@Axosadvisorservices.com) to learn more.

**Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.**

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