SOLO-K Overview

Overview for Financial Advisors

This product is intended to provide an easy streamlined approach for clients needing a Solo-K retirement plan. Our niche in this market is an easy-to-use product paired with a responsive and helpful client care team so that your clients can use our services from inception through to retirement.

Our Goal for Your Clients

Easy Plan Set Up: Your client should be able to complete this form in just a few minutes. We will be there to walk them through any questions they may have.

Clearly Defined Cost: Your client should be able to quickly determine how much they will be paying each year.

Dependable Service: You and your client can depend on us to answer your questions promptly and fully, as well as provide any annual review services needed.

Services We Do Not Offer With The Solo-K Product

Document Only Services: We have chosen not to offer Document Only services to our Solo-K clients. In our experience this can often end up being a disservice to the affected clients. As such, our offering includes full customer support and consulting.

Negotiable Pricing: We have chosen our pricing carefully to ensure we can provide what we believe is the necessary level of care to our mutual clients. We do not offer 'set it and forget it' services. We believe that when our clients call they should reasonably expect to reach someone promptly who can answer their questions.

Plan Takeovers: Contact us directly if you would like to have us review and take over a current SOLO-K product you have with another provider.

Our Expectation When Working With Solo-K Clients

Mutual Responsiveness: We understand Solo-K clients are busy business owners with many competing obligations. We will only contact them when necessary. To work together we must reasonably expect our clients will respond directly to calls and emails. Please ensure this is clear up front. We do not offer to work via an intermediary with business owners on their Solo-K plans.