



Supporting Advisor Success

How FuturePlan helps you win business and increase client retention:



Expertise on every plan type, delivering creative plan designs customized for each client's unique needs.



Building client loyalty with smooth efficient plan administration, worry-free reporting, seamless compliance, and award-winning customer service.



Best of both worlds: high touch personalized service backed by the strength and security of a large national firm, Ascensus.

**Call today for a free consultation
and connect with a FuturePlan
representative in your region.**

(866) 929-2525

Sales@FuturePlan.com

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 **FuturePlan**
by Ascensus



Let's Connect

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2021 Annual Plan Limits

	2021	2020	2019
Contributions and Benefit Limits			
Defined Contribution Plans	\$58,000	\$57,000	\$56,000
Defined Benefit/Cash Balance Plan Annuity	\$230,000	\$230,000	\$225,000
Cash Balance Maximum Lump Sum	\$3,000,000	\$3,000,000	\$2,900,000
401(k), 403(b) and 457 Plan Elective Deferrals	\$19,500	\$19,500	\$19,000
SIMPLE Plan Elective Deferrals	\$13,500	\$13,500	\$13,000
IRA (Traditional and Roth)	\$6,000	\$6,000	\$6,000
Catch-Up Contributions			
401(k), 403(b) and 457 Plans	\$6,500	\$6,500	\$6,000
SIMPLE Plans	\$3,000	\$3,000	\$3,000
IRA	\$1,000	\$1,000	\$1,000
Other			
Maximum Considered Compensation	\$290,000	\$285,000	\$280,000
Social Security Taxable Wage Base	\$142,800	\$137,700	\$132,900
Definition of Highly Compensated Employee	\$130,000	\$130,000	\$125,000
Definition of Key Employee	\$185,000	\$185,000	\$180,000