

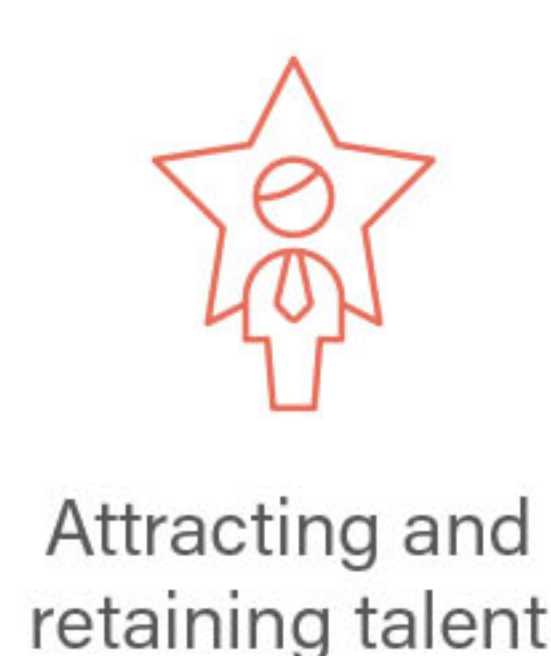
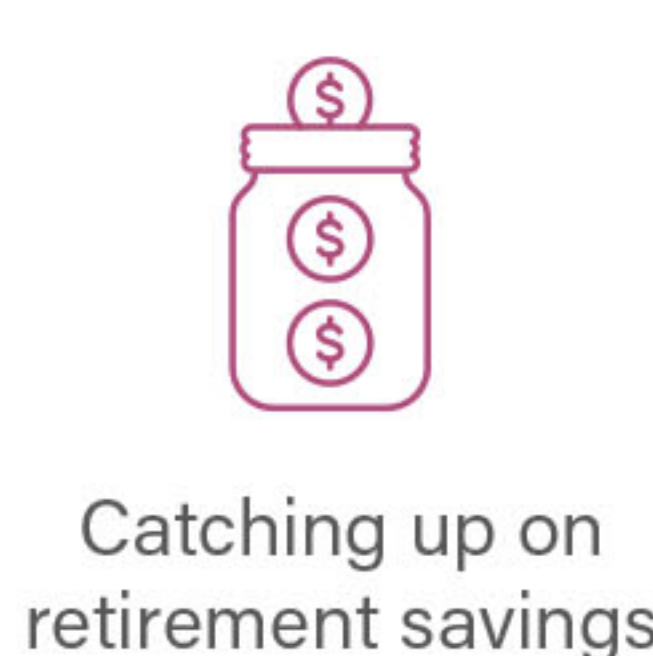
CASH BALANCE PLANS CONTINUE TO GROW



PLAN SIZE



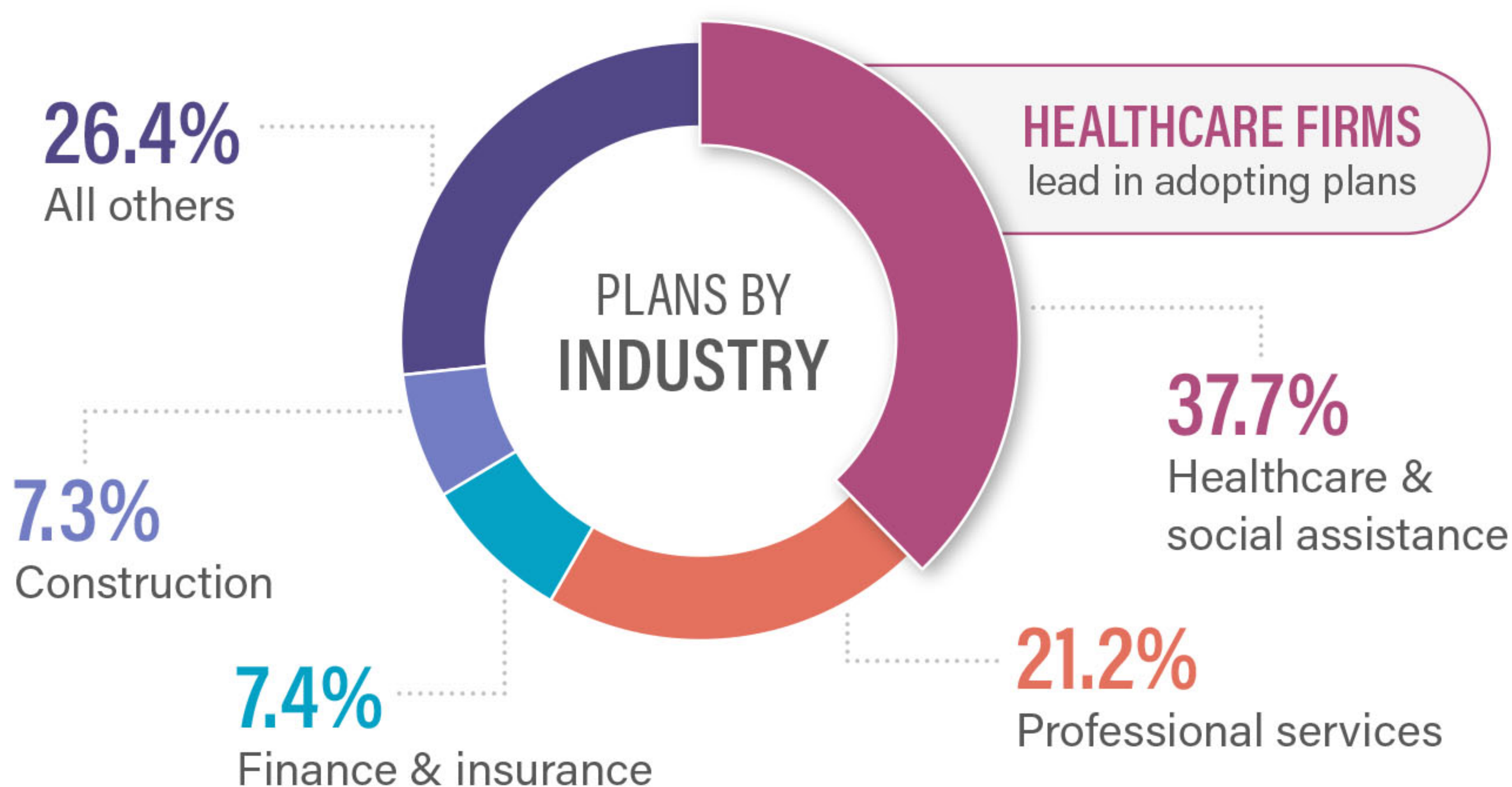
What makes cash balance plans so attractive to micro business owners?



CASH BALANCE BY THE NUMBERS



REGIONAL HIGHLIGHTS



CONTACT US FOR:

End-to-end support • Cash balance sales strategies • Complimentary plan designs



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Download the full report or visit cashbalancedesign.com for more information.

*Percent change in total number of plans between 2018 and 2020.

Source: FuturePlan's Center of Excellence National Cash Balance Research Report, March 2023. Analysis performed by FuturePlan, using 2020 data from IRS Form 5500 filings via the Judy Diamond Associates, Inc. database. Additional data on defined contribution and defined benefit plans comes from the Private Pension Plan Bulletin Abstracts by the U.S. Department of Labor and FuturePlan's own book of business. Some of the analysis in this report compares 2018 (the last year FuturePlan formally reported findings) and 2020, which is the primary year that this report is based on.

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