

# RETIREMENT PLAN SERVICES

## COMPLETE STRATEGIES FOR YOUR BUSINESS

Gregory, Sharer & Stuart partners with HK Financial Services (HKFS), a Top100 wealth manager in the U.S. (*Forbes*, 2016) to offer a full-service retirement plan program. Through a complimentary review by HKFS, you can assess your plan's potential tax savings, compliance, risk, employee education, and ensure overall fees are reasonable. Here are the key differentiators HKFS offers:

### CUSTOM DESIGN WITH A COMPREHENSIVE APPROACH

For retirement plans (401k and 403b) with \$500,000 to \$50 million plus in assets, owners and employees will be provided with strategies to help maximize contributions and tax deductions, while also increasing employee deferrals to meet retirement goals.

### FIDUCIARY LIABILITY PROTECTION

The plan investment liability will be reduced by having the highest level of fiduciary protection under the law.

### INVESTMENT MANAGEMENT

The asset allocation models are actively managed by a knowledgeable investment advisory committee which is always held responsible.

### EMPLOYEE FINANCIAL PLANNING AND EDUCATION

Your employees receive customized investment advice and guidance to help them meet their individual financial goals and retirement independence.

### COMPLIMENTARY REVIEW

To further enhance your current retirement program and understand your responsibilities, HKFS will provide a complimentary 360° comprehensive review of your current plan. Contact your CPA to schedule a call and start your review.

### WHY GREGORY, SHARER & STUART AND HKFS?

Gregory, Sharer & Stuart partners with HKFS, a wealth management company that specializes in accounting firm clients. HKFS works seamlessly with us to offer you an all-encompassing and guided approach to financial planning. HKFS is ranked as a top 50 Fastest Growing RIA<sup>1</sup> and top 100 Wealth Manager<sup>2</sup> in Forbes magazine.

<sup>1</sup> Forbes magazine dated 11/2016

<sup>2</sup> Forbes magazine dated 05/2016

Securities offered through ProEquities, Inc., a Registered Broker Dealer and Member FINRA and SIPC. Advisory Services offered through HK Financial Services (HKFS), a Registered Investment Advisor. Insurance products offered through many highly rated carriers. HKFS is independent of ProEquities, Inc. 6084288



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**YOUR FINANCIAL NAVIGATION PARTNER**