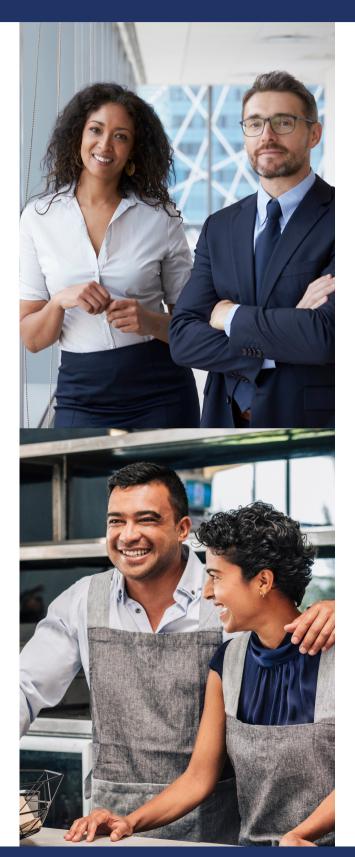
Non-Qualified Retirement Plan 2024 QUICK GUIDE





SUMMARY

A **Non-Qualified Retirement Plan** is a retirement plan that may use a life insurance platform to house the assets.

These specifically designed policies allow for tax-free withdrawals that mimic a Roth IRA or Roth 401(k) without age or income restrictions on your contributions and retirement income.

CONTRIBUTION/INCOME LIMITS

- Unlimited contribution limits due to the non-qualified tax status.
- After-tax contributions.
- **Tax-free income in retirement** when cash value remains below the Modified Endowment Contract (MEC) limits.

WHO IS THIS PLAN FOR?

Employers looking for additional contribution options in addition to other retirement plans.

Employers looking for a retirement option without the need to include employees.

Those looking to supplement retirement with tax-free income.

Business Owners who want the option to retire early.

Investors looking for additional platforms similar to a Roth IRA or Roth 401k.

<u>Click here</u> to see more plan options.