

# RETIREMENT made simple

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## 401k PLAN FOR YOUR BUSINESS

Let Headwater Investments and  
Guideline do the heavy lifting



# 1

### Fast, Easy, & Flexible

- Design your plan in just 20 minutes
- User-friendly dashboard syncs directly with payroll system
- Auto-Enrollment in Safe Harbor Plan plus optional ROTH 401k

# 2

### Low Cost & Low Time Commitment

- \$49 per month + only \$8 per enrolled employee
- Streamlined reporting and government filings
- Employer tax-advantaged through the SECURE Act

# 3

### Access to dedicated retirement advisors

- Professionally-managed portfolio
- Personalized for each employee
- See back for features

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## Deadline **November 15th**

to set up plan for 2022 contributions

# **Personalized Advice for your Employees**



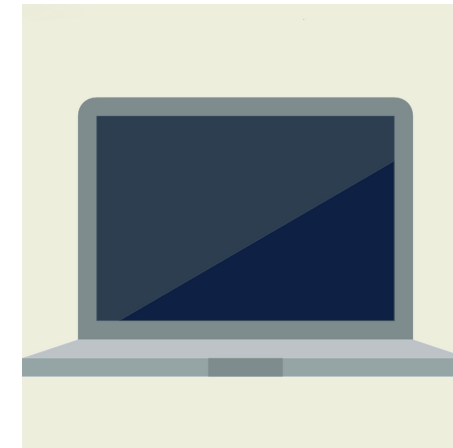
## **30-MINUTE PRESENTATION**

Advisor-led presentation to all staff

Review our goal for everyone's retirement plan: to reach financial independence

Explain power of compound interest

Provide basic overview of retirement options and how the dashboard works



## **ONE-ON-ONE ZOOM MEETING**

Optional private 30-minute meeting with one of our advisors

Employees fill out a short survey to provide basic information to make the session productive

Meeting tailored to each employee's needs and questions

Advisor available for follow-up questions

For more information and a free demonstration, please call  
**503.565.2100**

