



Retirement Plan Comparison Chart

	Solo(k) with Fisher Investments	401(k) with Fisher Investments	SIMPLE IRA with Fisher Investments	SEP IRA with Fisher Investments	
 Contributions	Employee income limits	None	None	None	
	Annual Contribution Maximum	\$57K ¹	\$57K ¹	\$13.5K	\$57K
	Incremental Owner Contributions Available	Yes ²	Yes ²	No	Yes ²
	Tax-Deferred Contributions	Pre-tax & Post-tax options	Pre-tax & Post-tax options	Pre-tax only	Pre-tax only
	Employer Contributions	Optional	Optional	Required (100% match up to 3%)	Required (Same % as owner)
	Loans Allowed	Yes	Yes	No	No
 Plan Management	Cost	Low Cost	Low Cost	Low Cost	
	Administration	Easy to start and maintain	Easiest to start and maintain	Easy to start and maintain	Easy to start and maintain
	Employee Exclusions	N/A	Yes	No	No

¹\$63,500 if over age 50. ²Up to \$356,500 annually via a cash balance plan.