

Questions?

Watkins Ross can answer your questions and help you determine if a cash balance plan is the right choice for you and your firm.

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Cash Balance Plan Checklist

The following checklist can serve as a general guideline to determine if your company is a good fit for a cash balance plan. Please complete this checklist and contact Watkins Ross to discuss.

- Professional service employers (physician groups, attorneys, CPAs, real estate agents, etc.).
- Principals who would like to save more for retirement than the statutory limit in a defined contribution plan (\$72,000 for 2026).
- Owners who are looking to accumulate sizeable assets for retirement in a relatively short time frame.
- Owners who are looking to minimize their tax liability.
- Companies that generate consistent profits each year.



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