

Medical Practice Expertise

professional consulting and plan design for optimum results

Comprehensive Service Platform

Comprehensive Plan Document and Design Services

Daily Valuation Record Keeping

24/7 Voice Response and Internet

Investment Selection, Monitoring and Consulting

Employee Communication and Education

IRS and Department of Labor Reporting and Compliance

Corporate Trustee Services

Plan Design Expertise

By utilizing advantageous contribution funding formulas and multiple plan strategies, MBM Advisors can often increase physician pre-tax contribution levels to two and three times their current limits. As a result, MBM is able to implement retirement plans for our medical practice clients that allow pre-tax plan contributions to be spread more evenly across the entire workforce, allowing medical professionals to more closely match their contributions as a percentage of actual earned income to those of their staff.

Multiple Plan Designs

By putting recent beneficial changes in the tax code to work, MBM is often able to successfully establish a combination of retirement plans for the benefit of our medical practice clients. Using sophisticated plan design strategies, we are able to provide our clients with substantially higher funding limits and increased flexibility in comparison to the more simplified retirement plans commonly used by other medical practices. MBM's advantageous design strategies allow medical professionals to:

- Contribute amounts in excess of the \$44,000 limit for profit sharing plans
- Contribute the entire amount on a pre-tax basis
- Defer taxes on the plan's investment earnings until withdrawn at retirement
- Borrow on an as-needed basis a portion of the amounts contributed to the plan
- Make a much greater annual pre-tax contribution towards their retirement

Comprehensive Service Platform

MBM provides specialized consulting expertise or complete turnkey services, depending on the needs of your medical practice. If your needs are more comprehensive, MBM can provide your medical practice with complete retirement outsourcing.

Multi-Family Fund Programs and Self-Directed Accounts

If you need a full service platform, MBM has the partnerships in place to make your plan a success. Because MBM understands your desire to use well-known, flexible trading platforms for executing stock, bond and mutual fund trades, MBM has established alliances with some of America's most recognized names in the retirement business. Our full-service trading platforms allow our medical practice clients to utilize the strength of our alliance partners' technology and research capabilities in tandem with MBM's consulting and plan design expertise. Our alliance partners include:

- Schwab Mutual Fund Marketplace / Schwab Personal Choice Retirement Account

