

Invest in Assets of Your Choice

With a Solo 401(k), you will be the one who decide what assets to invest in without asking for approval from any custodian.

Read our 5-Star  Reviews

“It was much easier than anticipated. The flexibility is great and the team is always there to answer my questions and address my concerns.”
David C.- Brea, CA

“My self directed Solo 401k started working for me right away when a friend wanted a 1st trust deed. Now I'm safely yielding tax free income.”
Lance L. – Culver City, CA

“Wealth of knowledge, given me the information and resources that has allowed me to positively take control of my retirement account and watch it grow tax free. Highly recommend!”

Julie G. – Chicago, IL

Our services include:

- Establishment of Solo 401k
- Obtain Trust EIN from the IRS
- Loan Procedure and Documentation
- Assistance with Rollover/Transfer
- Unlimited Client Support
- Assistance with Filing of Tax Forms
- Maintain IRS Compliance
- Turnkey Process for Bank Account
- Annual Contribution Calculator
- State-of-the-art Client Portal
- Access to Client Knowledge Base
- And much more!



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Take Control of Your Future with a Solo 401(k)



Solo 401(k) Plan with Checkbook Control

Solo 401(k) is a retirement plan for self-employed business owners without any full time employee.

➤ Checkbook Control

With a Solo 401(k), the role of a custodian is completely eliminated, which gives you, the plan owner, total control of the account. Investments can be made as easily as writing a check. This allows investors to act quickly when the opportunity presents itself.

➤ High Contribution Limit

Each Solo 401(k) plan participant is allowed to make elective deferral and profit sharing contributions. In 2017, the annual maximum contribution limit, including catch-up contribution, is \$60,000.

➤ Non-recourse Financing

With a Solo 401(k), investors are allowed to use non-recourse financing to purchase real estate properties. Unlike with an IRA, the use of non-recourse financing with a Solo 401(k) is not subject to unrelated business income tax (UBIT).

➤ Alternative Investment Options

This unique retirement solution also gives plan participants the ability to invest in alternative assets, including real estate, trust deeds, private business and more.

➤ Tax-Saving Benefits

Enjoy tax-deferral benefits in a Solo 401(k) account. Alternatively, plan owners can also choose to make after-tax contributions with the Roth Solo 401(k) and enjoy tax-free benefits on all investments!

Solo 401(k) Benefits

- No Income Limit
- No Tax on Leveraged Real Estate
- High Contribution Limits
- Tax Deferral Benefits
- Checkbook Control
- Alternative Investments
- Asset Protection
- No Custodian Fees
- Tax-free Loan Option
- Tax-free Roth Account

Investment Options

- Residential Real Estate
- Commercial Real Estate
- Land
- Tax Liens/ Tax Deeds
- Real Estate Notes
- Precious Metals
- Private Business Funding
- Stocks & Mutual Funds
- And more!

Solo 401(k) vs Self-directed IRA

	Solo 401(k)	Self-directed IRA
Contribution Limit (as of 2024)	\$69,000	\$7,000
Loan Option	✓	✗
Tax-free Leveraged Real Estate	✓	✗

Call Us Today for a Free Consultation: (949) 228-9394