DANZIGER & MARKHOFF LLP
Attorneys at Law

Financial Advisors: **How to Get More Assets Under Management**

Danziger & Markhoff Custom Retirement Plans provide substantial benefits for your clients and increase assets under management for you

It's a Great Tool for Getting New Clients too

Danziger & Markhoff Custom Retirement Plans

Build More Assets Under Management

1 - Our plans maximize your client's contributions and assets under management

2 - Clients save money by reducing taxes and contributions made for their staff

3 - Plans are custom-designed specifically to your client's needs and goals

4 - The plans are highly flexible and can be adjusted to changing situations and opportunities

5 - Supported by attentive staff dedicated to your client's plan... not just an #800 number to call

6 - We have no conflicts. We do not make investments, nor do we sell any type of insurance

7 - We keep client's plans updated and compliant with current laws

8 - Danziger & Markhoff's plans are legally sound and provide creditor protection

9 - Plan contributions are fully tax-deductible and not subject to the Alternative Minimum Tax (AMT)

10 - Custom plan proposals are complimentary to Financial Advisor clients

Is Your Client or Prospect a YES or NO?

Send us the following information and we will prepare a complimentary retirement plan proposal, send it to you for review and present the proposal to your client together with you.

If they have a retirement plan:

Send us:

- A copy of current plan document or Summary Plan Description
- Most recent valuation report
- Employee Census

If they do not have a plan:

- Provide us with an Employee Census for a complimentary proposal

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Call us today for a complimentary review of your client's retirement plan or to discuss developing a new plan.

Call Andrew E. Roth, Esq.
(914) 948-1556 Ext. 8033
or aroth@dmlawyers.com

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Here's how a Danziger & Markhoff Custom Retirement Plan for your clients makes your work easier and more profitable

- Danziger & Markhoff Custom Retirement Plans enable your client to maximize plan contributions with the lowest staff costs

- A specific plan administrator is assigned to your client and provides prompt responses to questions enabling you and your client to make investment decisions in a timely manner

- Danziger & Markhoff can assist you and your client with planning ideas and plan alternatives for the upcoming year - also prevent "raiding" by the competition

- Danziger & Markhoff Custom Retirement Plans provide for cross-selling opportunities

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Call Today

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Danziger & Markhoff is one of the most experienced retirement plan design and administration firms. We have a complete staff of lawyers, actuaries and plan administrators in-house.

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