

Join Brandon Kepley of Tax & Financial Group and Jordan Cross, President of CrossPlans for a Lively Discussion on **401k & Qualified Retirement Plans**

Topics Will Include:

- What to do if you've outgrown CalSavers or your SIMPLE IRA.
- How to respond when employees ask for more modern retirement options.
- Plan designs that can boost your own retirement savings.
- Ways to structure contributions to maximize corporate tax deductions.

Whether you're looking to upgrade your benefits or just want to keep more of what you earn, this is a chance to get clear, focused guidance.

Presented by:



Brandon Kepley
Financial Advisor
Tax & Financial Group



Jordan Cross
CrossPlans

With years of experience in the field, they will share invaluable insights and practical knowledge designed to empower attendees in making well-informed decisions.

**Click Here to Register
for this Webinar**



Tuesday June 24th, 2025



8:00 AM to 9:00 AM

