



Archbright Retirement, has collaborated with Trutina Financial, to develop first-of-its-kind program with a 360-degree approach to solving important challenges at every level of your organization.

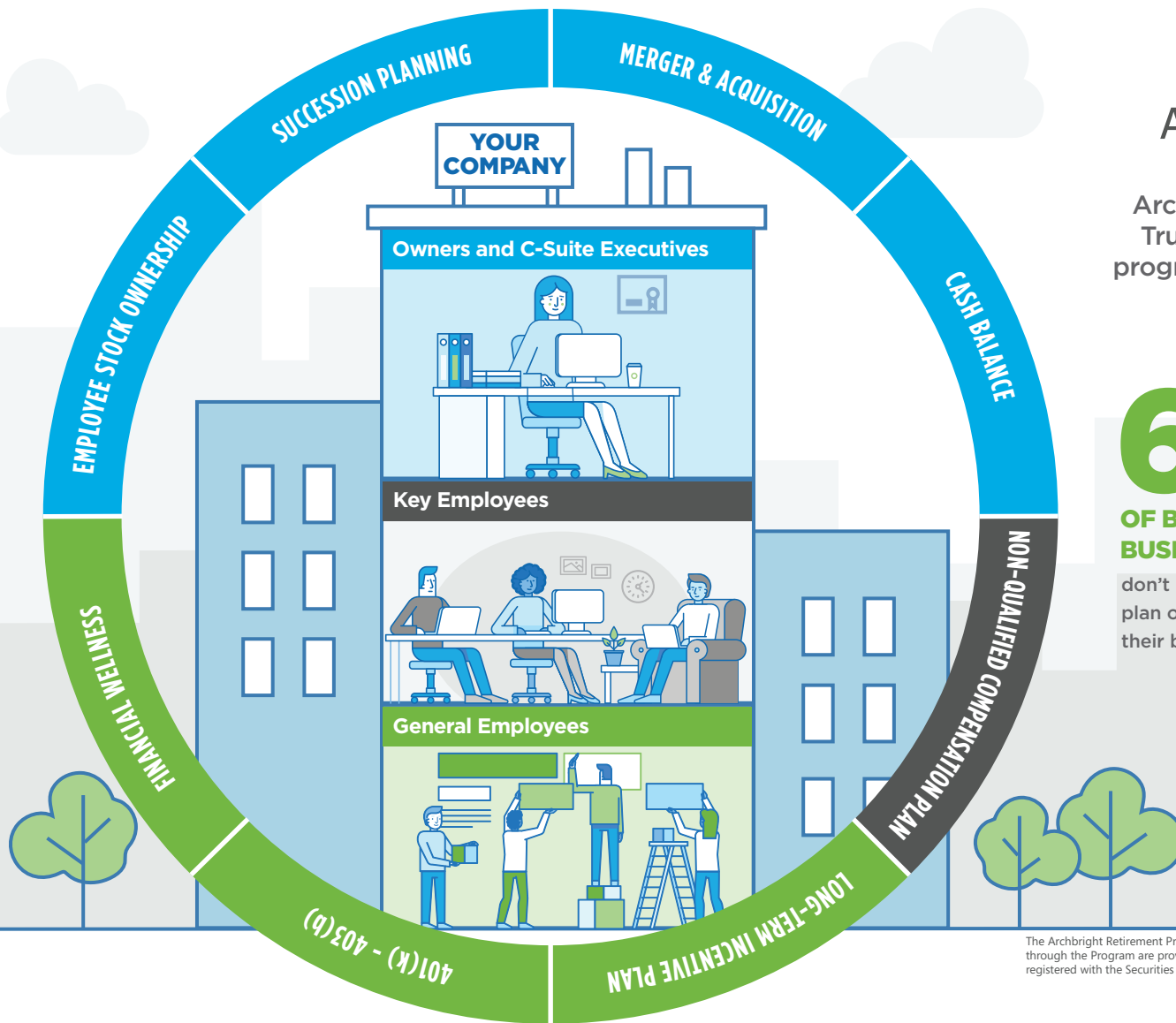
66%
OF BABY BOOMERS
BUSINESS OWNERS

don't have a formal transition plan or know the value of their business.¹

"Competition for talent will remain strong, so companies need to seek new and creative ways to engage and retain existing rock stars."²

60%
OF EMPLOYER
HEALTH COSTS

are impacted by financial stress.³



The Archbright Retirement Program is powered by Trutina Financial. All of the advisory, educational, and consulting services available through the Program are provided by Trutina Financial, a Registered Investment Advisor. Trutina Financial is an investment advisor registered with the Securities and Exchange Commission. Trutina and Archbright are independent, unaffiliated organizations.

FOR BUSINESS OWNERS AND KEY EXECUTIVES

EMPLOYEE STOCK OWNERSHIP PLAN

Provides a liquidity opportunity for owners, tax benefits for the company, allows owners to maintain desired control, and encourages employee buy-in.

SUCCESSION PLANNING

Helps develop a plan for owners looking to retire within 10 years that will meet objectives for their eventual exit from the business.

MERGER & ACQUISITION

Analyzes your business and industry activity. Provides debt/lending advice, growth planning, and a market analysis to see if a merger or acquisition is right for your business.

CASH BALANCE

Provides tax relief for high earning businesses and/or owners through a qualified retirement plan typically used in combination with a 401(k). The plan is eligible for rollover at retirement.

FOR KEY EMPLOYEES

NON-QUALIFIED COMPENSATION PLAN

Plans are custom designed for each key employee offering more pre-tax savings, unique compensation designs and incentives, flexible/long-term vesting and distribution options.

FOR GENERAL EMPLOYEES

LONG-TERM INCENTIVE PLAN

Provides custom, long-term benefits & incentives to non-key employees, above and beyond 401(k) contributions.

401(k) and 403(b)

Industry leading 401(k) and 403(b) plans with exclusive benefits from many top providers. Plans are customized around employer demographics & needs.

FINANCIAL WELLNESS

State-of-the-art financial wellness program that helps your employees with their personal financial challenges, creating a happier, more secure and engaged workforce.

¹ Based on 2017 study by Exit Planning Institute (EPI). "The state of owner readiness".
² Jake, CEO of executive recruiting firm named one of the fastest 100 in WA.