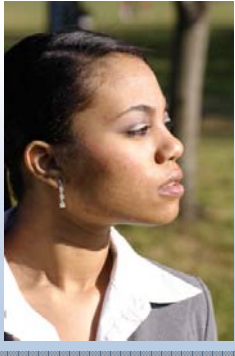




BENEFIT EQUITY, INC.

Create a New Beginning



Listen:

We take the time to understand your situation. Success begins with alignment of priorities.



Plan:

Proactively gathering information ensures a sustainable future.



Save:

The success of each participant is the result of a plan that BEI manages. Nothing is more important than reaching the goal!

Executive Summary

What we do

Equipping employers, business owners and their employees with tailored retirement plans, Benefit Equity, Inc. helps people accumulate wealth allowing them to reach their financial goals.

BEI sells no products or investments and instead focuses on establishing government approved retirement plans that provide valuable benefits to employees. Our plans are unique, time tested and certified. Because we are independent Administrators & Actuaries, our specialized plans provide the most creative strategies to build wealth.

About Us

- Established in 1989 by Robert H. Gorelick, APA
- **650+** plans which represent over **30,000** plan participants.
- **Types of plans managed:**
 - 401(k)/403(b)
 - Profit Sharing
 - Money Purchase
 - Defined Benefit
 - Cash Balance
 - Cross Tested DB-DC combination
 - ESOP
- 18 employees
- Locations in Santa Ana & San Diego, CA
- 200+ years combined pension experience
- Designations held by staff:
APA, APR, ERPA, QPFC & FLMI

Why companies hire us

- **Integrity** - Our culture & reputation is built on trustworthiness, dedication and loyalty
- **Efficiency** – Systems-driven & powered by talented pension professionals; provides fast and accurate information
- **Results** - Proven track record of successful retirement plans for over 20 years

Let BEI build the foundation for your future!

Member of:



Find us on:



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Santa Ana, CA 92705
(714) 480-1364
www.benefitequity.com

Strategic Partnerships

401(k) Providers

- American Funds
- Great West Retirement Services
- ING
- John Hancock USA
- Lincoln Life
- Nationwide Financial
- OneAmerica
- OpenGate - PenCal
- Oppenheimer Funds
- Principal Financial Group
- The Hartford Insurance Company
- Transamerica Retirement Services

Mutual Fund Families

- AIM
- Alliance Bernstein
- American Century
- Fidelity Investments
- Invesco Van Kampen
- Ivy Funds
- Janus Funds
- JP Morgan
- Lord Abbott
- MFS
- Oppenheimer
- PIMCO
- Ridgeworth



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