

Dental practice benefits from retirement plan services



Candor. Insight. Results.

A Minnesota dental clinic providing preventive, cosmetic, restorative, and pediatric dental services, found added value through Baker Tilly Investment Advisors' retirement plan consulting services.

The business challenge

While working with the client on their tax and practice advisory needs, the client's tax advisor discovered that the method used to allocate employer contributions in their retirement plan was not as favorable to the dentists as it could be.

The Baker Tilly solution

The tax advisor introduced the client to a Baker Tilly Investment Advisors' retirement plan consultant. The retirement plan consultant analyzed the plan and provided the client with an alternative allocation method. The client was thrilled with the solution since it was still fair to all sixteen participants, yet provided a significant benefit to the two dentists. The new allocation allowed both dentists to reach the IRS maximum contribution limit without increasing the overall contribution to the plan.

The tax advisor then introduced the client to members of Baker Tilly Investment Advisors' investment committee to improve the service they were receiving in managing their 401(k) plan investment funds. Based on the value and expertise the retirement plan consultant had demonstrated, the independent investment advice Baker Tilly Investment Advisors could provide, and the rigorous investment approach we follow, the client was eager to replace their current advisor with Baker Tilly Investment Advisors.

Baker Tilly Investment Advisors is a Registered Investment Advisor that offers independent and objective financial advice. The group provides fee-based (not commission) investment consulting to individuals and organizations with the goal of protecting and growing wealth. Clients include businesses, government entities, retirement plan administrators, and high net worth individuals.

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