



LETORT
TRUST

CUSTOMIZED RETIREMENT SOLUTIONS



WHY CHOOSE US?


Our approach caters to the diverse landscape of small, closely held, or privately-owned enterprises, acknowledging the varied structures and sizes within our clientele. We ensure that businesses of all scales, from small startups to larger established entities, feel represented and valued.

Our commitment extends beyond mere categorization:

We prioritize understanding the unique goals of each owner. Whether it's fostering employee loyalty, maximizing deferral options for owners and highly compensated employees, optimizing tax benefits, or a blend of these objectives, our flexible approach empowers us to craft tailored plans. With complete ownership of the process, we offer unparalleled flexibility in plan design, ensuring alignment with the individual needs of each business owner.

“It’s not just about providing solutions; It’s about designing a plan with a purpose.”

Contact Us

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