



Poorly performing 401k plan?

Should you be worried about fiduciary lawsuits or losing talent?

401k dilemma...high fees and choices limited to the stock market

Limiting investment choices to the stock market does not offer the diversification and protection employees need to preserve their wealth against market volatility. Couple that with high management fees, inflation, and taxes and employees are forced to work well beyond their retirement plan.

What if you could offer true diversification, consistent growth, and low fees?

Your 401k could become a differentiator.

Unlike other traditional 401k plans, the Wealth CAP's self-directed 401k plan gives your employees the ability to further diversify their assets by choosing from investments both inside and outside the market. Traditional investments (e.g. stocks, bonds, mutual funds), safe investments (e.g. annuities, insurance, CDs), and alternative investments (e.g. real estate, precious metals, oil/gas). Freedom doesn't stop at investment choices. Wealth CAP also frees your employees from high costs and transaction fees!



Free financial wellness education and comprehensive roadmap.

Who else does that?

Become the hero by equipping employees for life's challenges, such as budgeting, saving for a house, or paying off debt with Wealth CAP's on-demand financial wellness education. Additionally, the comprehensive retirement roadmap gives employees a 360° view of finances, social security, student loans, debt reduction, taxes, Medicare, education, estate, relocation, and budgeting. More importantly, each employee gets a retirement blueprint that defines their retirement journey.

Don't forget the 401h for tax-free retirement medical savings.

Truly unique.

The cost of healthcare is already expensive. Imaging the financial toll it will place on retirees in 20-30 years! With the 401h, employees can mitigate the impact of this future burden by setting aside money today that can grow tax-deferred and be accessed tax-free to cover medical related expenses during retirement.

Wealth CAP
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