



**RETIREMENT
PLAN SOLUTIONS**

RETIREMENT

MARTEL
WEALTH ADVISORS

WHO WE ARE

Retirement Plan Solutions

Martel Wealth Advisors, Inc. is a locally owned independent investment advisory firm in Vancouver, Washington. For over 35 years, we have been helping businesses with retirement plan solutions. Martel Wealth Advisors, Inc. is here to help businesses large and small take on the unique financial changes faced by business owners.

Whether you are a business owner or retirement plan sponsor, **Martel Wealth Advisors, Inc.** understands that you have a choice when selecting an investment advisor. It is our steadfast goal to develop and maintain a long-term relationship with you and to be a valued resource for your professional practice or business. We work closely with you to gain a full understanding of your overall financial situation. It is this close relationship that sets us apart from the large investment, insurance and banking organizations.

We are committed to providing you with objective, holistic, and creative solutions to the array of financial challenges that you may face. **Martel Wealth Advisors, Inc.** is a unique organization in that we provide institutional-quality investment management services coupled with the intimacy of a privately held boutique firm.

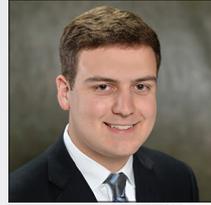
CONTACT US



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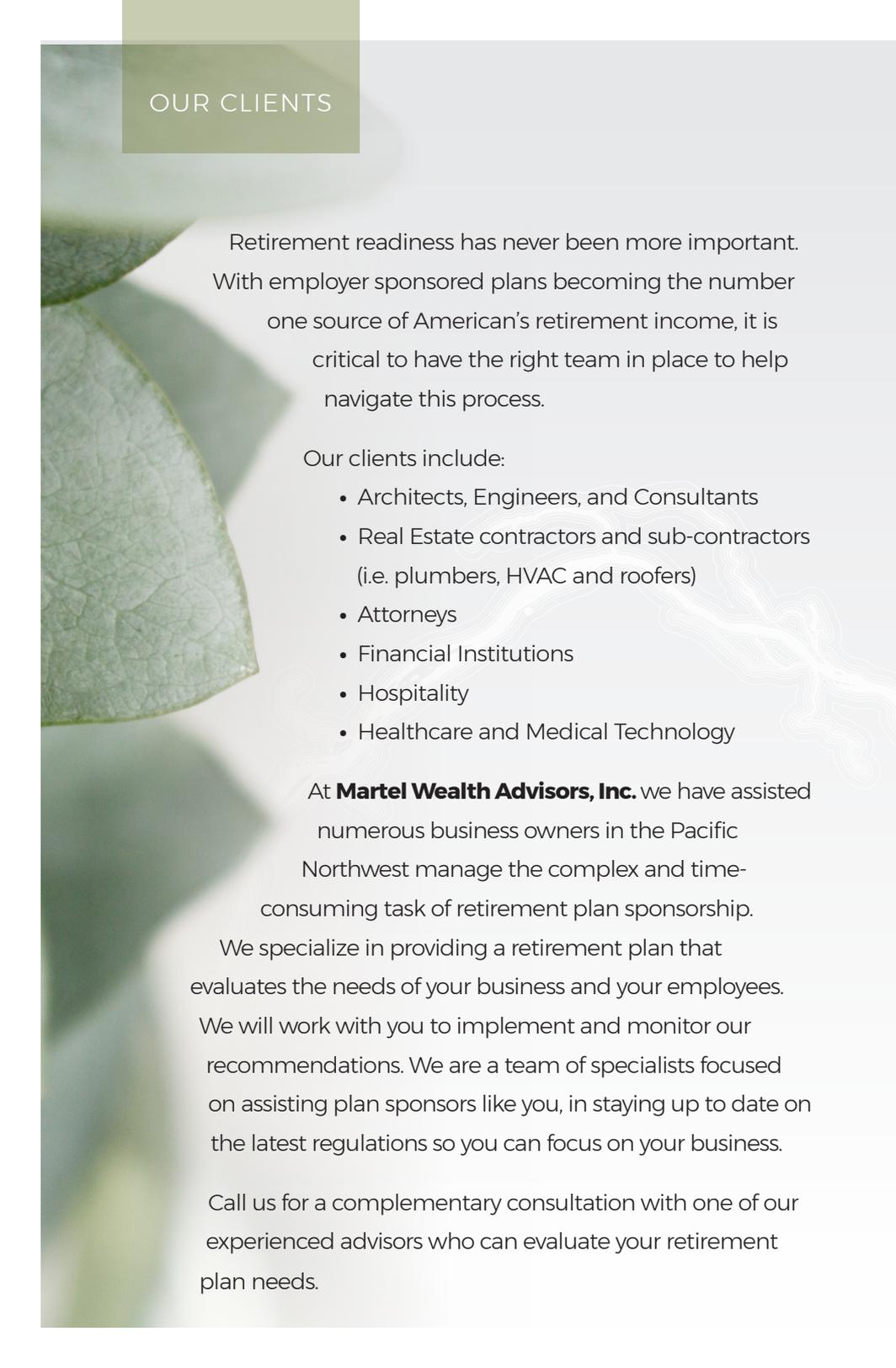


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OUR CLIENTS

Retirement readiness has never been more important. With employer sponsored plans becoming the number one source of American's retirement income, it is critical to have the right team in place to help navigate this process.

Our clients include:

- Architects, Engineers, and Consultants
- Real Estate contractors and sub-contractors (i.e. plumbers, HVAC and roofers)
- Attorneys
- Financial Institutions
- Hospitality
- Healthcare and Medical Technology

At **Martel Wealth Advisors, Inc.** we have assisted numerous business owners in the Pacific Northwest manage the complex and time-consuming task of retirement plan sponsorship.

We specialize in providing a retirement plan that evaluates the needs of your business and your employees. We will work with you to implement and monitor our recommendations. We are a team of specialists focused on assisting plan sponsors like you, in staying up to date on the latest regulations so you can focus on your business.

Call us for a complementary consultation with one of our experienced advisors who can evaluate your retirement plan needs.



Tap or Swipe to Pay

76

Toast

\$5.50

\$2.50

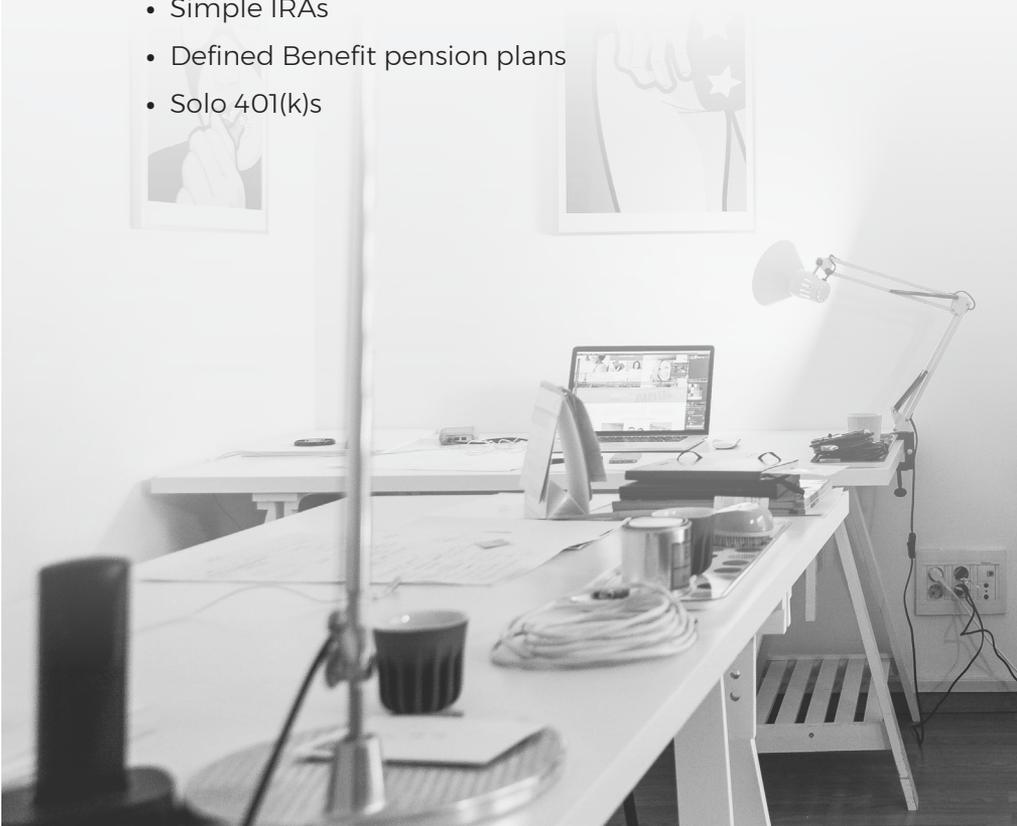
\$0.76

OUR SERVICES

Martel Wealth Advisors, Inc. is an independent registered investment advisory firm. We focus on helping our retirement plan services clients build successful retirement outcomes for their owners and employees.

We offer a wide-range of employer-sponsored retirement plans, including:

- 401(k)s
- Profit Sharing plans
- SEP IRAs
- Simple IRAs
- Defined Benefit pension plans
- Solo 401(k)s



Our extensive retirement plan solutions rival those of large firms, while our focus on building strong and lasting relationships sets us apart from the competition. We provide a full range of services to help you and your employees make the most of your company sponsored retirement plan.

- Fee-only open architecture platform that allows us to use the best money managers, including Vanguard
- Long-standing relationships with local third-party administrators (TPAs)
- Fiduciary education and training for plan administrators
- Annual employee education meetings
- Ongoing monitoring and evaluation of plan investment options
- Prudent investment practices
- Full and transparent fee disclosure





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Advisory services offered through Martel Wealth Advisors, Inc.