



# Secure 2.0 Tax Credits

SIZE OF EMPLOYER	START-UP COST CREDIT	EMPLOYER CONTRIBUTION CREDIT	AUTOMATIC ENROLLMENT CREDIT
1-50 employees	100% of Eligible Start-up costs, capped at the lesser of \$5,000 or \$250 times the number of non-highly compensated employees	100% for first 2 years, lesser of actual employer contribution or \$1,000 for each employee who earns under \$100,000, phased out over 5 years	\$500
51-100 employees	50% of Eligible Start-up costs, same cap as above	Same as above, minus 2% times the number of employees above 50	\$500
100+ Employees	0% of costs	\$0	\$0

Start-up credit is available for up to three tax years

Employer contribution credit is phased out over 5 years, 100% for first 2 yrs, 75% 3rd yr, 50% 4th yr, 25% 5th yr

Automatic enrollment credit is available for up to three tax years and solo-k plans qualify as well



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