PlanForge
CONSULTING

Refer a client. Get paid. Look like a hero.

Your business-owner clients are leaving SECURE 2.0 tax credits unclaimed. Bring them a 401(k) that can pay for itself, and get paid for the introduction. You make it, we do everything else.

WHY IT IS AN EASY SALE

$1,000

per employee, per year, for 5 years in tax credits for your client, plus up to $15,000 covering startup costs. Dollar for dollar, not deductions.

WHAT THE OWNER SEES

−$13,816

net plan cost for a real 44-employee Texas business under our optimized design. Saves $57,104 vs a typical 3% safe harbor. Live at planforge401k.com/tnt-ref

YOUR 30-SECOND JOB

10 to 75

W-2 employees, with no 401(k) or one worth moving. Rollovers qualify the same as new plans. Make the introduction. We do the rest.

FOUR WAYS YOU EARN, PAID QUARTERLY BY DIRECT DEPOSIT

$250–500 referral bonus per plan: $250 for your first, $500 for every one after

5–20% of plan revenue, quarterly, for 3 years per plan. Tier floats with your rolling 12-month production

+66% higher plan fees on optimized cross-tested designs, so your share rises when the client keeps more

2.5–7.5% override on plans from partners you recruit, rated by your service quality

All from administrative fees, never from assets under management. A steady partner referring 5 plans a year books around $10,750 a year by year three. Top partners clear $45,000.

PLUS: GET DISCOVERED WHILE YOU SLEEP

Active partners are listed in the directory inside the PlanForge app, searchable by specialty and location. Participants across all our plans can find you, book you, and become your clients. Track every referral in your own portal at partners.planforge401k.com

3×
OVERRIDE FOR TOP-RATED PARTNERS

Start with one introduction

STEP 1 Model your earnings planforge401k.com/partner-calculator
STEP 2 Register a referral planforge401k.com/refer
STEP 3 Talk to Nick Nick@planforge401k.com · 214-908-2310

Guided by Nick Moore, CFP®. A real advisor. Not a call center.

GET THE APP

Program terms may change. Paid as 1099 compensation. See the partner guide at planforge401k.com/partner-guide for full rules.