

Benefits Planning

EMPLOYEE RETENTION THROUGH
CREATIVE BENEFITS PLANNING



Joe Gupton & Grady Smith



About
Joe Gupton
Benefits Advisor

Since 2008, Joe Gupton has thrived in his role, guiding businesses in the implementation of innovative plan designs aimed at bolstering employee retention and fostering a positive workplace culture, all while effectively managing costs. With a wealth of experience in employer-sponsored benefits, Joe possesses a keen understanding of the dynamic and evolving landscape of complex benefit options, enabling him to formulate strategic solutions. A proud graduate of East Carolina University, Joe also actively participates in the Garner Civitan Club and is fluent in Spanish.



About
Grady Smith
Financial Advisor

Grady is a dedicated Financial Advisor with a lifelong commitment to helping others, inspired by his father's decades-long career in a leading mutual fund company. Combining his passions for assisting others and financial discipline, he has spent over 7 years specializing in retirement planning and administration for businesses of all sizes. Grady values the discovery process, taking the necessary time to help families and businesses define their financial objectives. His expertise lies in crafting meticulous strategies to guide his clients toward achieving their long-term financial aspirations.

DATE

January 25th, 2024

TIME

8 - 8:30AM Registration
8:30 - 10AM Discussion

**Light breakfast + refreshments provided*

LOCATION

Raleigh Country Club

located at 400 Donald Ross Dr.
near downtown Raleigh

TOPICS

- Secure Act 2.0: Tax Credits & Provision Changes for Retirement Plans
- Retirement Plan Offerings: 401k, SIMPLE IRA, SEP IRA
- Increasing Employee Retention: EAP's, Telehealth Services, Counseling Resources
- Defined Contribution/Profit-Sharing Plans
- Maximizing Health Benefits and Creative Funding

To RSVP:



or email events@jones-insurance.com