



40 Years of Experience – A Tradition of Excellence

Working with Benefit Strategies means working with an industry leader in personalized retirement plan management with four decades of building relationships

Employers

Tax Professionals

Employees

Your retirement plan management solution

About Benefit Strategies

Forty years ago, Donald J. Potter, Jr. founded the first privately owned, fee-only retirement plan consulting firm in Southwest Virginia. Benefit Strategies offered employers an alternative to the bank trust departments that dominated this market. By focusing on new plan designs and the administrative team to support them, Benefit Strategies was a pioneer in

establishing 401(k) plans, multi-tiered defined benefit plans, and cross-tested profit sharing plans.

[Read Our Story](#)

Our Professionals

You are served by experienced, objective and well-trained consultants who are highly skilled in each of their specialties.

[Meet the Team](#)

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Secure Access

Document Portal
Employee Account Access

Questions?

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BENEFIT STRATEGIES
RETIREMENT SERVICES

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