

Future Benefits is big on experience, yet small enough for all specialists to be responsive and available to all clients.



Founded in 1987, **Future Benefits, Inc.** is a fee-based SEC-registered investment advisory Firm specializing in asset management.

Check the background of this firm on [FINRA's BrokerCheck](#).

Specifically, we manage and provide investment services for:

- Corporate retirement plans: pensions and profit-sharing
- 401(k) plans
- Trust accounts
- IRAs
- Individual and family investment plans
- Endowments
- Nonprofit organizations: 403(b) plans

In managing client assets, **Future Benefits** specializes in analyzing outside money managers and no-load mutual funds – with a focus on independence, transparency and minimizing transaction costs. In short, we manage investment managers on behalf of our clients, structuring entire portfolios to meet specific income and growth objectives.

