



You're In Charge®

Organizational Chart



Planning Department
National Design Legal Staff
Financial Modeling/Testing
Business Owner Planning
Advanced Estate Planning
Risk Management Analysis
Retirement Planning
Management Planning
Access to firm-wide resources

Business Exit Solutions
Six Step Planning Process
Value Gap Analysis
Bus Exit Readiness Analysis
Client/Advisor Education
Business/Estate Plan Coordination
Strategy Specialists Access
Seminars/Workshops
Educational Symposiums
Professional CE

Marketability Assessments
Mid-Market Investment Banker Access
Business Valuation
Sale of Business
Capital Raising
ESOP
Management Buy-Out – MBO

Small & Large Market Non-Qualified Deferred Comp Solutions
Split Dollar Design
Sample Plan Templates
Ongoing Plan Administration
Key Person Solutions
Buy-Sell Funding Solutions
COLI Analysis & Solutions
Synthetic Equity Plan Design

- Phantom Stock Plan
- Stock Grant Plans
- SAR Plans
- Stock Option Plans

Specialists Collaboration

Business Sponsored Retirement Plans

- PSP
- 401(k)
- Defined Benefit
- Group Insurance