BUSINESS INTELLIGENCE INSTITUTE

NOLAN FINANCIAL



You're In Charge®

Organizational Chart









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 MarketNon-Qualified DeferredComp SolutionsSplit Dollar DesignSample Plan TemplatesOngoing PlanAdministrationKey Person SolutionsBuy-Sell FundingSolutionsCOLI Analysis & SolutionsSynthetic Equity PlanDesign- Phantom Stock Plan- Stock Grant Plans- Stock Option Plans
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LIFECOMP[®]

Specialists Collaboration

DLincoln Financial Distributors® A member of Lincoln Financial Group

Business Sponsored Retirement Plans - PSP

- 401(k)
- Defined Benefit
- Group Insurance

Securities and investment advisory services offered through Lincoln Financial Advisors Corp., a broker-dealer (member SIPC) and registered investment advisor. Insurance offered through Lincoln affiliates and other fine companies. In MI, securities and investment advisory services offered through Lincoln Financial Advisors Corp. a broker-dealer, registered investment advisor and an insurance agency. In CA, insurance offered through Lincoln Marketing and Insurance Agency, LLC and Lincoln Associates Insurance Agency, Inc. and other fine companies. In UT, LFA Insurance Agency. Insurance offered through Lincoln affiliates and other fine companies. In WA, insurance offered through Lincoln Financial Advisors Corp. and LFA Limited Liability Company and other fine companies. Lincoln Financial Group is the marketing name for Lincoln National Corporation and its affiliates CRN-1233909-062415