



STRATEGIC INCENTIVES

LEADERSHIP. OWNERSHIP. STEWARDSHIP



LEADERSHIP HOW DO WE SCALE

- Long Term Incentive Plans
- Synthetic Equity
- Change in Control Bonus Plans
- Nonqualified Deferred Comp
- Qualified /401(k) Plans



OWNERSHIP HOW TO BE RESILIENT

- Buy-Sell Agreements
- Entity/Ownership Structure
- Profits Interest
- Restricted Stock & Options
- Sales to Insiders/ESOP



STEWARDSHIP HOW TO HARVEST

- Succession Planning
- Retirement Planning
- Estate & Charitable Planning
- Insurance Planning
- Investment Planning

We Are Proud to Share Two of our **High-Impact Assignments** for 2021

Strategies for All Stakeholders

Husband and wife owners of an \$500M engineering services firm were exploring a combination of executive compensation and owner succession strategies. We led a multi-advisor team spanning legal, leadership, tax, and estate planning services.

- We formulated a tax-free equity design to segregate divisions that are subject to, and excluded from, value sharing with executives and employees.
- We evaluated multi-generation succession options spanning estate structure, liquidity, control, legacy, and growth.
- We helped the family and the executives select a tax-advantaged 100% ESOP as a long-term strategy for selected divisions of the company.

RESULT | Solved vexing family succession issues

High Performance Equity Model

A \$60M government contractor with a dozen owners was in search of a refreshed owners' equity model spanning founders, recent owners and next-gen leaders. We centered on a high-performance model of equity grants and synthetic equity.

- For owners, we crafted a restricted stock economic model for "unicorns" across recruiting, retention and reward.
- For next gen leaders, we crafted a synthetic equity plan to increase visibility of promotion track and greatly reduce the friction of initial buy-in.
- For all leaders, we crafted a class-based qualified profit-sharing plan permitting for discrimination in favor of high performers.

RESULT | Owner model transformed from "luck" to meritocracy

Harmonizing the Capital of Business and Life® **Bring Us Your Questions.**

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