



Synthetic Equity & Executive Incentive Plans

Qualified Plans & Corporate Benefits

Ownership & Capital Structure

Investment Planning

Tax Reduction Strategies & Value Continuation Planning

BOLD Value Team Helps Our Clients Address Many of The Most Pressing Questions Related to Growth, Succession, and Preservation.

How Do We Scale by attracting & retaining great talent?



- Synthetic Equity Plans
- Nonqualified Deferred Comp
- Qualified/401(k) Plans
- Corporate Benefits

How Do We Manage entity structure across stages of corp growth?



- Entity/Ownership Structure
- Profits Interest
- Buy-Sell Agreements
- Sales to Insiders/ESOP

How Do We Harvest wealth, preserve assets and retire in style?



- Estate & Charitable Planning
- Investment Planning
- Life Insurance Strategies
- Succession Planning

We Are Proud to Share Two of our **High-Impact Assignments** for 2016

Next Generation Incentives

A \$200M, rapidly growing professional services firm wanted a new long term rewards program to incentivize diversified growth and team collaboration.

- Our process embraced goal setting and team spirit of different executive groups including "in-early" execs and recent hires who felt under-compensated.
- We introduced combination strategies to balance the cash & retirement needs of the executives with the realities of the company's forecasted cash flow.
- We fortified "what's working" by making the current equity and cash plans more visible via enhanced communication and innovative tax-advantaged liquidity options.

RESULT | Visible and practical incentives without excessive cost

Equity Model for Growth

A 30 year old, \$90M IT consulting firm sought a resilient equity model to energize both long term growth and perpetual succession.

- The overall strategy focused on shareholder value enhancement for both new and legacy unit-holders.
- We utilized our proprietary "Sell, Pay, & Convey" model to enhance the partnership's existing equity transfer model. Across an opportunity spectrum, equity can be sold, paid and conveyed to executives.
- The current model was "made affordable" combining skin-in-the-game equity solutions for incoming new partners coupled with innovative tax-free buyout for founders.

RESULT | New equity model positioned partnership for growth

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

MARK C. BRONFMAN, MBA, CPA*

Sagemark Consulting 703-749-5064
8219 Leesburg Pike Mark.Bronfman@LFG.com
Vienna, VA 22182 www.BOLDValue.com

BOLDVALUE®
Capital Solutions At Work

Sagemark
Consulting™
A division of Lincoln Financial Advisors®

The BOLD Value Service Line is Dedicated to the Specific Needs of Middle Market Business Owners. Mark Bronfman and his team members of the Bold Value service line are registered representatives with Lincoln Financial Advisors Corp. Securities offered through Lincoln Financial Advisors Corp., a broker/dealer, Member SIPC. Investment advisory services offered through Sagemark Consulting, a division of Lincoln Financial Advisors Corp., a registered investment advisor. Insurance offered through Lincoln affiliates and other fine companies. CRN-1694593-012617

*Licensed, not practicing