



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 2018

### M&A Growth Platform

A founder of a \$200M IT services firm sought a talent-magnet incentive program to facilitate aggressive growth on the pathway to a high-value exit.

- We presented a dynamic value-sharing scenario model building confidence in the business expansion and overall growth plan.
- We crafted leading and lagging metrics to incentivize enduring performance along with an upside sharing platform of accretive grants, vesting & payout provisions.
- The flexible incentive structure enabled a strong balance of organic and M&A growth across legacy and new executives over a five-year period.

**RESULT** | Grew 5X followed by a near billion dollar exit

### Holistic Succession Roadmap

Founders of a \$100M GovCon sought a stand-alone incentive design. With our help, they realized the need to lay a comprehensive succession pathway to prioritize long term capital priorities.

- Via strategic exploration, we guided the founders to zoom in on their preferred ultimate succession goal: a high value change in control.
- We crafted a proprietary Value Band model leveraging over two dozen customized features in alignment with the well-orchestrated succession plan.
- We also designed a business continuity trust to integrate owner estate planning, leadership succession strategy and company viability in event of founder incapacity.

**RESULT** | Succession roadmap leading to revitalized team focus on growth

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

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