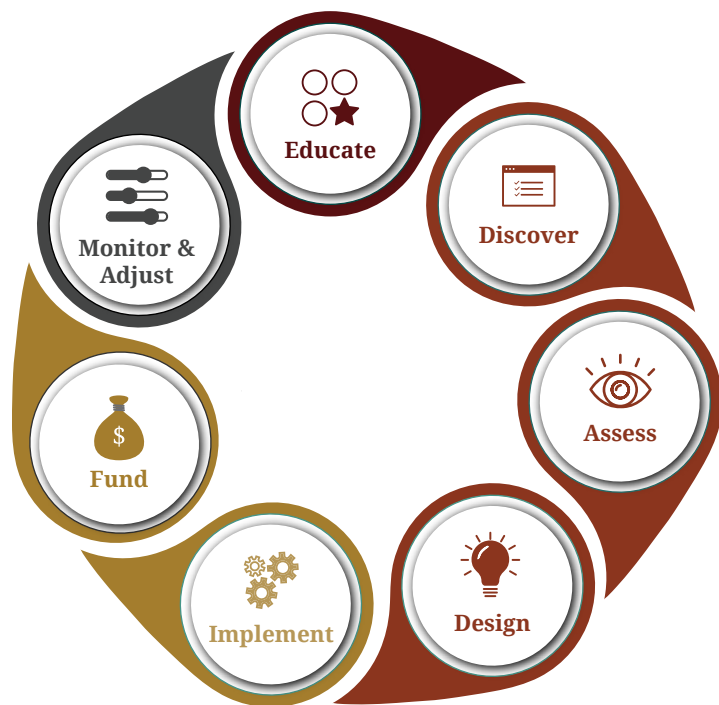


# THE ASG NONQUALIFIED PLANNING PROCESS



At the Advanced Strategies Group, we believe strategy must lead structure—because prescription before diagnosis is malpractice. Our consultative approach is built to uncover the unique characteristics of your organization, its goals, culture, people, and long-term vision—before crafting any plan. This process ensures every recommendation is aligned, strategic, and actionable.

**Here's how we deliver clarity and confidence throughout the nonqualified planning journey:**



**1. EDUCATE** — Key stakeholders receive a clear, executive-level overview of various nonqualified plan options, regulatory considerations for ERISA and the IRS, and how these plans support recruitment, performance, and retention of mission-critical talent.

**2. DISCOVER** — Through data collection and collaborative discussions, we explore business goals, compensation strategy, competitive positioning, and key talent priorities to shape plan direction.

**3. ASSESS** — A detailed review of any current nonqualified plans—or organizational readiness if none exist. We help identify compliance issues, design gaps, and opportunities to improve plan effectiveness.

**4. DESIGN** — ASG will collaborate with leadership to build a plan that reflects your goals. Plan features such as eligibility, vesting, deferral rules, funding strategies, and payouts are developed in alignment with company objectives, legal requirements, and executive needs.

**5. IMPLEMENT** — Once a design is finalized, we lead the RFP process to secure best-in-class service providers: specialty recordkeepers, legal counsel, and trust companies. We can also assist with plan document creation and execution, participant communication, and HR training to ensure a smooth rollout.

**6. FUND** — We help align your informal funding strategy with the plan's objectives by evaluating the most tax efficient options available to meet your balance sheet, income statement, and liquidity goals while managing liability commitments.

**7. MONITOR & ADJUST** — Our role doesn't end at launch. ASG provides ongoing reviews, compliance updates, and feedback-driven refinements to keep the plan aligned with regulatory changes, business objectives, and participant needs.

**To schedule your complimentary education session with Elle Moser, contact: [elle.moser@mystrategyteam.com](mailto:elle.moser@mystrategyteam.com)**

Powered by: **INDEPENDENT [FINANCIAL] PARTNERS<sup>®</sup>**

Securities offered through IFP Securities, LLC, dba Independent Financial Partners (IFP), member FINRA/SIPC. Investment Advice offered through IFP Advisors, LLC, dba Independent Financial Partners (IFP), a Registered Investment Adviser. IFP and Advanced Strategies Group are not affiliated.