

What Are Your Goals And Objectives?

Prescription before Diagnosis is Malpractice

KEY EMPLOYEE BENEFITS

1. Would you be interested in exploring strategies that help recruit, reward, and retain mission-critical employees?
 2. Are you open to ideas that selectively reward top performers beyond what your 401(k) or qualified plan design allows?
 3. Have you considered incentive compensation designs that inspire key employees to act like owners without granting actual equity?
 4. Would you be interested in learning how to structure long-term financial incentives that promote loyalty through “golden handcuff” arrangements?
 5. Would your top-earners be interested in pre-tax income deferral solutions that can go well beyond the 401(k) deferral limits?
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CORPORATE CAPITAL MANAGEMENT

1. Are you actively managing corporate liquidity to be ready for unexpected opportunities or disruptions?
 2. Have you explored tax-aware investment structures that align with G.A.A.P. guidelines while optimizing after-tax returns?
 3. Are you interested in ways to protect corporate assets against market volatility or economic shocks?
 4. Have you protected your business from the untimely death, disability, or departure of a mission-critical employee?
 5. Are you open to discussing strategies like Corporate Owned Life Insurance (COLI) that combine long-term capital growth with tax efficiency and enhance your executive benefits?
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SUCCESSION & EXIT PLANNING

1. Have you explored strategies that could help you monetize your business value with timing and tax efficiency in mind?
 2. Have you considered funding mechanisms that can help facilitate your exit or succession plan?
 3. Would you be interested in exploring ways to help key employees buy into an ownership position, without requiring them to self-finance the purchase?
 4. Are you interested in strategies that could create tax-free income in retirement?
 5. Are you curious about ways to protect your net worth from creditors and unnecessary income and estate taxes?
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If these questions sparked uncertainty or curiosity, let's talk.

To schedule a confidential discovery call and explore whether we are good fit for you – and you for us – email **Elle Moser**, at elle.moser@mystrategyteam.com to get better acquainted.

www.asgnqpc.com