



NOT JUST RIGHT, RIGHT FOR YOU.



**Rick Wagner, JD**

Rick has over 30 years of experience custom designing human resource solutions. He has deep technical expertise in areas such as employee stock ownership plans, equity-based long-term incentive plans, deferred compensation structuring, retirement and welfare plans, and compensation benchmarking/ reasonable compensation analyses in both the for-profit and not-for-profit sectors. These skills enable Rick to help his clients pursue their strategic objectives by aligning owner and employee interests, while navigating the myriad of tax, accounting, and regulatory challenges.

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**Brook Bise, CPA**

Brook has nearly 25 years of experience in accounting, consulting, and large corporate human resource departments, primarily focused on employee benefits. Brook provides insightful consulting on all aspects of employee benefit plans, including on-site internal human resource department support, with the goal of assisting companies in ensuring their plans are both technically compliant, and are operating efficiently and effectively in support of the company's strategic objectives.

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## LONG-TERM INCENTIVE PLAN DESIGN AND IMPLEMENTATION

Long-Term Incentive Plans ("LTIPs") have been a staple of compensation structuring for public companies for years and are now quite common for private companies as well. The impetus can be employee attraction, retention, motivation, succession planning, or all the above.

The rules can be quite complex and the key to finding/designing the right plan is a delicate balance between navigating the compliance issues and customizing the plan design to help drive the strategic vision of the organization. This can be as much art as science.

We have lived and worked through the various tax, accounting, and securities law changes over the last 30 years and have helped countless companies simplify this complex process. Our methodology is both insightful and thorough in that we bring creative alternatives to the table for consideration and vet them thoroughly to ensure that the final product will achieve the stated objectives and will stand up to the inherent uncertainty of strategic leadership; regardless of the industry or environmental variability.

While we have the skills and experience to ensure technical compliance, our goal is always to help companies find the right solution for them. So whether you're new to the concept of LTIP plan design or a seasoned veteran, we have both the skills and insight to help you and your business succeed by ensuring your incentive compensation plans are perfectly aligned with your strategic objectives.