

Attract.
Retain.
Reward.
With EBS.

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BOSTON, MA | CARLSBAD, CA

www.ExecutiveBenefitSolutions.com

“We would recommend EBS to those firms looking for creative, dedicated consultants whose plan designs meet the need to attract, retain and reward key employees.

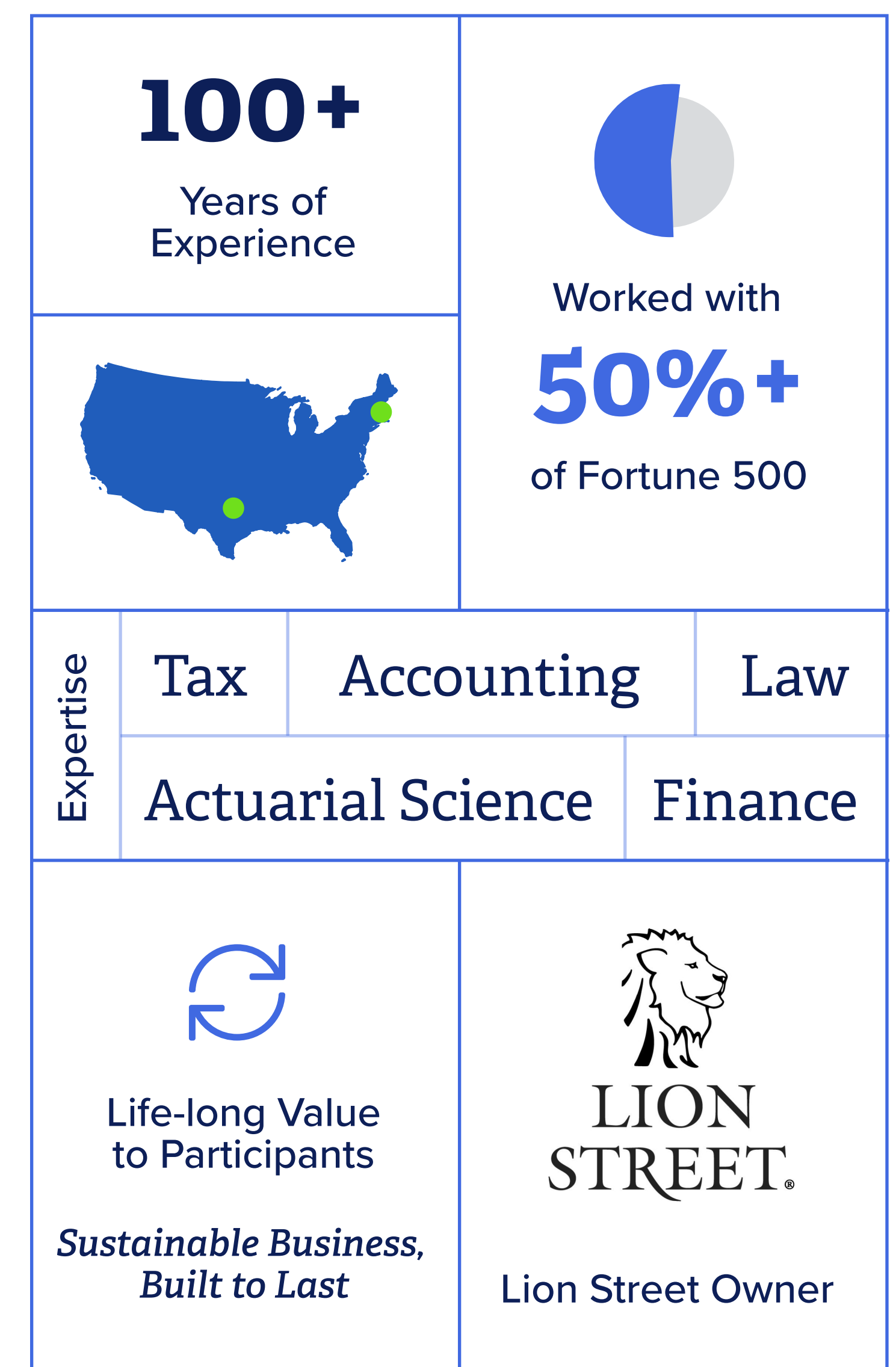
Joe Shepela
Compensation Committee Chairperson
Technology Credit Union

About Us

- EBS specializes in the **design, implementation, and administration** of **executive benefit plans**.
- We are a firm of independent consultants with national resource centers in Boston and Dallas, and consulting offices nationwide.

Our Team

- Our founders have over 100 years of cumulative experience and worked with more than 50% of the Fortune 500
- Our team includes professionals with expertise in the areas of tax, accounting, law, actuarial science, and finance.
- The programs we design provide life-long value to participants. As such, we are a sustainable business that is built to last, which is critical to the clients we serve.
- EBS is an owner of Lion Street, a national organization that provides additional resources to over 200 firms that specialize in asset management, wealth transfer or executive compensation & benefits



Our Exclusive Focus

Helping clients **attract, retain, and reward** key employees and professionals.

- Through the creative design and cost-effective financing of compensation and benefits programs.
- In a manner that strategically aligns the motivational aspects of executive benefit programs with the goals and objectives of ownership.

Our Markets

The unifying characteristic of our clients is their need to attract, reward and retain the key employees most responsible for their firm's success.



- **Public companies** – from the Fortune 500 to the Russell 2000.
- **Private for-profit companies** – with various corporate structures including C-corporations, S-corporations, LLCs, etc.
- **Nonprofit organizations** – including colleges and universities, medical institutions, charitable organizations and credit unions.

EBS has a deep understanding of the tax laws that uniquely affect each of the entities and the expertise to design effective programs in each segment.

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“The team at EBS is a pleasure to work with and has helped us make our plan a more valued benefit for key employees.”

Hans Miller
Chief Financial Officer
W. Atlee Burpee & Company

Our Expertise

Deferred Compensation Programs focused on retirement income

- Pre-tax voluntary deferral programs that allow highly compensated employees to contribute in excess of what's permitted in qualified plans (401(k), 403(b))
- Supplemental Executive Retirement Plans (SERPs) funded by the employer with either a defined contribution or target benefit design
- Deferral and diversification of Restricted Stock Units (RSUs)

Executive Life Insurance Plans offering supplemental life insurance and optional non-taxable retirement income

- Employer provided Death Benefit Only programs
- Employer funded 162 Bonus plans
- Split Dollar Arrangements, particularly for non-profit organizations

Long-term incentive programs including

- Performance based SERPs
- Phantom equity programs for privately held businesses

Our Approach

Our approach is what sets us apart. It is highly **analytical**, **collaborative**, and **cost-effective**, and is based on these fundamental principles:

 Partnership with clients	 Detailed fact finding & analysis	 Data-driven design & analysis	 Consideration of a range of alternatives
 Comprehensive financial analysis	 Accuracy and dependability	 Participant education and communications	 Communication with plan sponsors

4-Step Engagement Process

We execute our approach using a four-step engagement process:

1	Fact-Finding/ Brainstorming	2	Plan Design & Analysis
3	Implementation, Documentation, Participant Communication/ Education, & Enrollment, Informal Funding	4	On-Going Plan Administration and Technical Support