SAVANT WEALTH MANAGEMENT
EST 1986

EXECUTIVE COMPENSATION

Planning for Life

Wise Counsel

Savant Wealth Management provides comprehensive wealth planning and specialized knowledge to senior-level corporate executives who have equity-based compensation. Savant serves as a guide to help integrate your executive compensation and benefits with your personal and wealth planning considerations. Our goal is to help senior executives maximize their equity compensation, minimize risk and taxes, and manage cash flow and the impact of taxes. As a trusted advisor and executive coach, our in-depth knowledge of executive compensation, financial and wealth planning, tax, and investments is designed to help provide our clients with a comprehensive recommendation toward their ideal future.

EQUITY COMPENSATION IN CORPORATE LIFE

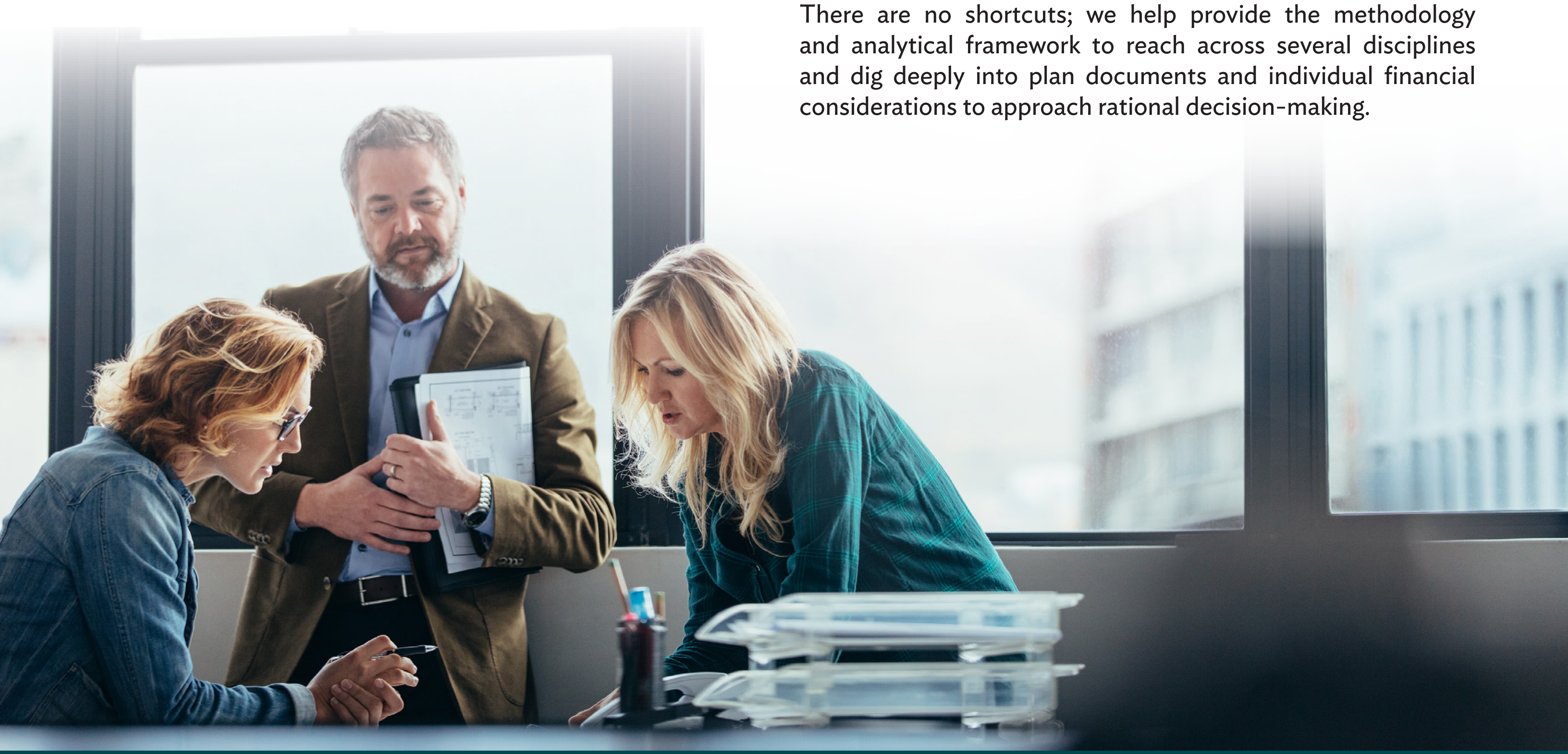
One of the productive rewards of a corporate career is the opportunity to participate in the success of your company. You have accumulated a substantial share of your wealth in equity compensation by climbing the corporate ladder, including stock options, restricted stock units, performance share units, deferred compensation, and other forms. You need a guide well-versed in equity compensation, related accounting and tax issues, and financial planning to navigate the complexities, restrictions, guidelines, and tax considerations associated with your company stock and options. You may be concerned about a range of financial issues, such as company-specific risks, timing for divestiture, tax efficiency, and public scrutiny. We believe these issues call for a fiduciary advisor—one who represents your best interests.

MAKING THE MOST OF YOUR EQUITY COMPENSATION

Corporate executives are fortunate; the mix of cash and equity compensation offers the chance to build wealth in ways that are unavailable to most people. As you know, it is too easy to leave money on the table by making a move at the wrong time or missing a window of opportunity in the corporate calendar. Having professional guidance to optimize your equity compensation can potentially make a big difference. The administrative complexity, tax, timing, and valuation issues all require careful evaluation and wise strategic decisions.

You have individual financial considerations to factor in as well. Retirement, education expenses, or buying a vacation home may be on the horizon. The appropriate funding method for these and other goals can be addressed in the fullness of a comprehensive financial plan.

There are no shortcuts; we help provide the methodology and analytical framework to reach across several disciplines and dig deeply into plan documents and individual financial considerations to approach rational decision-making.



SAVANT OFFERS A HOLISTIC APPROACH TO FINANCIAL PLANNING THAT CONCENTRATES FIRST ON THE SOURCE OF YOUR WEALTH

For most decision makers, time is your most valued asset. While you are making your company successful, you can look to Savant to help optimize your financial decision-making. Learning more about your personal goals, individual situation, and concerns brings us closer to understanding issues that need to be addressed now, as well as in the future. Our services fall into these key areas:

LONG-TERM INCENTIVE PLAN (LTI) SERVICES

Our analysis helps to uncover the value in your equity-based compensation.

- Strategic stock option planning
- Restricted stock and deferred compensation strategies
- Executive transition and financial parity – The value of equity compensation can often be overlooked in evaluating competitive employment offers

FINANCIAL PLANNING

Our financial planning process is designed to help go beyond the traditional planning methodology and includes valuation, tax, timing, liquidity, risk management, and estate planning.

- Recommendations based on comprehensive needs analysis and goal setting
- Cash and tax flow analysis – The timing of cash flows is important to capture the value of your equity compensation, have liquidity available to exercise, and pay taxes
- Retirement, charitable, and college planning
- Business succession
- Risk management and estate planning – A contingency plan for your spouse and family members to preserve their interests in case of unplanned events

EXECUTIVE PLANNING SERVICES (EPS)

As a corporate executive, you juggle the demands of work, travel, community involvement, and family. Why not outsource the implementation and monitoring of your equity compensation? Our executive planning services include:

- Comprehensive, single-source, proactive, ongoing services
- Annual tax planning and preparation
- Estate, charitable, retirement, and college planning with annual monitoring
- Risk management
- Cash flow planning and monitoring
- Investment planning, allocation, and management
- Quarterly investment performance monitoring
- In addition, we offer tax planning. The time to consider tax implications is in advance of undertaking major financial transactions. Tax savvy advice can uncover overlooked ways to retain your money; however, tax considerations should never override investment considerations. We also have the capability to provide tax services to those clients who need help preparing their tax returns.

Savant Wealth Management is a trusted wealth planning advisor to senior-level corporate executives with equity compensation. Savant offers a fee-only, holistic approach to wealth planning, coupled with deep subject-matter expertise on equity-based compensation. Once your plan is in place, Savant takes on the complexity, monitors compensation events, and manages your plan. In the event of your disability or death, your spouse or partner has a highly engaged advisor to implement, monitor, and help guide your plan to help secure your family's financial future.

Visit us at www.savantwealth.com to learn more about how we work with executives. We look forward to helping you pursue your financial goals.

About Savant Wealth Management

Savant Wealth Management is a leading independent, fee-only firm that has been serving clients for more than 30 years. Since inception, we have been committed to one key principle: all financial advice should be offered in the best interests of the client. We offer our clients wise counsel to help them pursue their financial goals.

As a trusted advisor, Savant offers investment management, financial planning, tax and consulting, retirement plan, and family office services to financially established individuals and institutions.

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