



## A Workplace Benefit That Works: Financial Planning for Key Executives

In the war for talent, compensation and benefits programs have grown more robust and more complex.

Do your key employees understand and value all that your compensation and benefit programs offer?

For over 45 years, we have partnered with human resource professionals to be a trusted resource for their key employees through formal financial planning engagements paid for by the company.

AMG advisors become experts on the details and intricacies of your compensation plans. They help to educate and encourage employee adoption of benefit programs that fit their needs.

AMG advisors help your key employees to generate the wealth that creates long-term financial security and peace of mind. During uncertain times or through life events such as divorce or the death of a loved one, this advice is especially valued. AMG advisors help your key employees make timely financial decisions to keep their focus on your business, lessen disruption, and improve their health and wellbeing by lowering stress.



**Maintains focus during uncertain times**



**Lessens disruption during life events**



**Enhances value of compensation programs**



**Lowers stress and supports total wellbeing**

### Help Executives Turn Career Success into Financial Wellbeing

#### Senior Executives Can Benefit From:

- An independent, proactive advisor dedicated to the success of their entire personal financial strategy
- Timely decision making about benefit program participation and elections
- Maximizing compensation programs, including personalized stock option exercise strategies
- Minimizing tax liabilities through income, expense, and investment cash flow planning
- Limiting liability through integrated property and wealth protection strategies
- Tax-efficient strategies to transfer excess wealth through estate planning and planned charitable gifting
- An opportunity to keep AMG as a trusted partner as their assets and financial needs become more complex



AMG's comprehensive approach to executive financial counseling is their competitive advantage. They offer ongoing financial positioning assessments that are measured in decades, ensuring greater financial peace of mind for me and my family.



— Dan Houston, Chairman,  
President & CEO at Principal Financial Group

# Tailored and Integrated Wealth Management

AMG offers personalized, tax-aware financial counseling for executives plus discretionary investment management and other integrated solutions

Executive Financial Counseling	Investment Research & Management*	Integrated Solutions*
<ul style="list-style-type: none"><li>• Compensation and benefit planning</li><li>• Cash flow planning</li><li>• Tax planning</li><li>• Financial security scenario forecasting:<ul style="list-style-type: none"><li>– Retirement</li><li>– Disability</li><li>– Death</li></ul></li><li>• Investment review</li><li>• Risk exposures assessment</li><li>• Estate planning<ul style="list-style-type: none"><li>– Multi-generational wealth transfer</li><li>– Philanthropy</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Proprietary economic and asset class research</li><li>• Tax-aware asset allocation modeling</li><li>• Fund manager research and monitoring</li><li>• Managed multi-asset portfolios</li><li>• Managed equity portfolios</li><li>• Access to alternative investments</li></ul>	<ul style="list-style-type: none"><li>• Tax preparation</li><li>• Trust administration</li><li>• Charitable giving through an affiliated donor-advised fund</li><li>• Private-client banking</li></ul>

*\*Discretionary investment management offered for an advisory fee toward which the financial counseling program benefit may be applied. Other AMG solutions offered for a specific service fee.*

## AMG National Trust

- Over 45 years of wealth management experience
- 145 staff located in 8 offices across the country; headquartered in the Denver Tech Center
- \$8.1 billion assets under management as of March 31, 2024
- Well-capitalized and independently owned National Bank



Contact us today to learn how we can help.  
[www.amgnational.com](http://www.amgnational.com) | 800.999.2190