JUNE TOPIC: BACK BY POPULAR DEMAND!

Helping Business Owners Craft Better Long-Term Executive Compensation Solutions: Part 2

Organizer and Moderator
Clark Childers, Partner, **Cherry, Bekaert & Holland, L.L.P.**

Presenters
Mark Bronfman, Private Wealth Advisor, **Sagemark Consulting**
Gil Weiner, Managing Director, Compensation and Benefits Solutions, **Cherry, Bekaert & Holland, L.L.P.**

Long-term Executive Compensation has undergone huge changes. Stock options have become less attractive in the war for talent. IRS Section 409 (A) has greatly limited flexibility on different types of long-term plans. Volatility is dramatically higher, making equity based programs challenging. Integration of qualified and non-qualified plans has become increasingly common. All of this empowers business owners to craft customized long-term compensation plans that fit the company, the owner and the individual executives.

This presentation will focus on:

- The Art of the Possible: What You Can Do with Executive Compensation
- Protecting the Business Owner's Interests: Avoiding Entitlement Programs
- Executive Compensation Solutions for a World of Intense Volatility
- Crafting Win/Win/Win Solutions for the Owner, Key Executives and the Business
- When to Share True Equity, Synthetic Equity, Profit Sharing
- IRS Limitations
- Integrating Metrics that Matter into Executive Compensation
- The Advantages of Qualified Plans: When They Work; When They Do Not

Mark C. Bronfman, Private Wealth Advisor, Sagemark Consulting

Mark C. Bronfman, MBA, CPA*, is a Private Wealth Advisor with Sagemark Consulting / Lincoln Financial Advisors in Vienna, Virginia. He specializes in helping business owner clients effectively and strategically repositions business and personal assets to achieve long term objectives. Key facets of his practice include executive compensation, business transfer, estate planning, wealth management, tax minimization strategies, charitable planning, and, in conjunction with outside resources, business growth. Mark founded and directs the BOLDValue® Program within Sagemark Consulting which is dedicated to value maximization opportunities for business owners. Prior to Sagemark Consulting, Mark served as an Equity Partner with Accenture with an emphasis on financial and business strategy. Mark had previously served as Director of Litigation and Financial Services with Deloitte Consulting. Mark holds an MBA from the University of Virginia (Darden) and a B.S. in Accounting from Penn State.

* Mark is a licensed, non-practicing Certified Public Accountant

CXO Forum 09-10 SERIES

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THURSDAY JUNE 10 2010

7:30am to 8:00am
Networking and Continental Breakfast

8:00am to 9:00am
CXO Forum Panelist(s) Presentation

9:00am to 9:15am
Burning Issues

Discuss your specific issues and challenges with colleagues and fellow CXO members

Location
Cherry, Bekaert, & Holland
1934 Old Gallows Road
4th Floor
Vienna, VA 22182
703-506-4440
For directions, visit www.CXOForum.com

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APRIL TOPIC ▸▸

Gilbert J. Weiner, Managing Director, Compensation and Benefits Solutions, Cherry, Bekaert & Holland

Gilbert J. Weiner, JD, is Managing Director of Cherry, Bekaert & Holland's Compensation and Benefits Solutions Practice. As an attorney with extensive benefits and compensation experience, Gil assists employers in optimizing their employee, executive and director compensation and benefit arrangements to achieve tax efficiencies; ensure competitive practices; mitigate business, fiscal and tax risk; and improve their potential post-transaction market positions. Gil's expertise lies in the efficient design and maintenance of compensation and benefits programs, golden parachute mitigation planning and compliance, and transaction and integration planning related to human resources, compensation and benefits.

Previously, Gil was director of the southeast compensation and benefits practice of KPMG, and served as national co-chairman of their compensation and benefits transaction services group. He served as a senior manager in the compensation and benefits consulting practice of PricewaterhouseCoopers, and as the tax and benefits counsel with oversight of international tax, legal and compliance activities for a $35 billion petroleum corporation. Gil holds a Bachelor of Arts degree from Northeastern University and a Juris Doctorate from Suffolk Law School. He has studied at Boston University, Harvard University, Temple University and the University of Exeter (U.K.). He is a frequent guest speaker and lecturer at national and regional Tax Executive Institutes; Georgia, Florida and Triad (North Carolina) Tax Forums; international employee benefits conferences; bankers trust conferences; and numerous other organization and group venues. He has appeared on radio and television programs and has published several articles in industry publications.

2009-2010 RECAP

SEPTEMBER 10, 2009
The Power of Networking
Bill Stokes, Chairman, Washington Network Group (WNG); Executive Search Consultant

OCTOBER 8, 2009
Selling to the Government: What Small Business CEO's Need to Know (To Win Contracts)
Presenters: **Scott Ulvi**, President & CEO, Triumph Enterprises, Inc.; **Tony Martin**, PhD, President & CEO, Strategic Solutions Unlimited, Inc.

CXO FORUM ANNUAL SOCIAL, OCTOBER 27, 2009
Guest Presentation by **Donald T. Beery**, Partner, Plus Point Partners, LLC; Corporate Sponsor: **McCandlish & Lillard**

NOVEMBER 12, 2009
2010 Economic Forecast: What's Ahead for the U.S. and Washington on Jobs, Housing, Growth Sectors, and More
Stephen S. Fuller, PhD, Dwight Schar Faculty Chair and University Professor; Director, Center for Regional Analysis, School of Public Policy, George Mason University

DECEMBER 10, 2009
What CXOs Need to Know About Effective Advisory Boards
Bob Morgan, Co-Founder & CEO, MorganFranklin;
Elizabeth Murphy, Founder & President, CFM Partners

JANUARY 14, 2010
Growing a Company from $0 to $500M: Insight from a Business Leader
Dennis Ratner, CEO of Hair Cuttery and The Ratners Cos.

MARCH 11, 2010
CXO FORUM ROUND TABLE
Sue Evans, President & CEO, Evans Incorporated,
Hope Johnson, President & CEO, Pyramind LLC

APRIL 8, 2010
Branding Your Business: Selecting and Protecting Strong Trademarks
Laura Bates, Principal, Brand Verve
Ralph M. Tener, Principal, Head of Information Technology Group, McCandlish & Lillard, PC

MAY 13, 2010
Let THEM Sell YOU: Creating Differentiation to Grow
Jim Schleckser, CEO and Managing Partner, Inc. CEO Project
Ian K. Altman, Principal, Grow My Revenue LLC

JUNE 10, 2010
Helping Craft Better Long-Term Executive Compensation Solutions
Mark Bronfman, Private Wealth Advisor, Sagemark Consulting
Gil Weiner, Managing Director, Compensation and Benefits Solutions, Cherry, Bekaert & Holland, LLP