

# THE ASG LAW FIRM BENEFITS AND PLANNING PLATFORM



*Designing an Integrated Infrastructure to Elevate Attorney Success—  
and Secure Your Firm’s Future*

*What’s Your Plan for Financial Independence?<sup>SM</sup>*

**Use the ASG Discovery Process to uncover which priorities or pain points are most relevant to your firm and warrant a deeper conversation with our team**

PLANS	Are you losing associates to firms perceived to offer more robust retirement, benefits, or personal financial planning?
	Does your benefits package clearly differentiate your firm as a preferred destination for elite legal talent?
	Is your firm’s 401(k) a customized, dynamic wealth-building vehicle, or just another off-the-shelf retirement plan platform?
	Would your internal 401(k) fiduciary committee value having oversight duties streamlined to less than 90 minutes per year?
	Has your 401(k) undergone a fee study in the last 24 months to ensure your all-in core plan costs are below industry benchmarks?
	Would your partners benefit from access to a voluntary Cash Balance Pension Plan that potentially enables six-figure tax-deductible retirement contributions?
	Have you explored supplemental excess group benefit plans (e.g., Disability, Long Term Care or Life Insurance) designed to protect high earners who lose their ability to practice law?
	Have you explored how your high income attorneys and partners can access exclusive insurance-based solutions that can generate tax-free retirement income?
	Would associate retention improve with a formalized path-to-partnership program that rewards long-term commitment, even when partnership isn’t extended?
Have you explored “Golden Handcuff” deferred compensation agreements that discourage rainmaker defections while simultaneously building firm-level contingency capital?	
PLANNING	Does your firm offer personalized investment portfolios that serve all attorneys and staff—while also providing broader diversification and enhanced performance opportunities for large-balance participants?
	Would your firm’s professionals value access to an integrated self-directed brokerage window (SDBA) that allows for professional management and greater control over investment selection?
	Would your 401(k) large account balance participants benefit from hedging strategies that protect against major market losses during the five years before and after retirement?
	Would your attorneys appreciate access to an advisor who understands their time constraints, tax burdens, and planning complexities, offered with a negotiated professional courtesy fee arrangement?
	Would your staff benefit from a financial wellness resource that reduces stress, builds loyalty, and reinforces their value to the firm?
	Would your attorneys benefit from a limited-scope Financial Independence Blueprint that delivers a tangible plan without requiring a long-term relationship?
	Do the highest earners in your firm have access to coordinated personal tax, financial planning, and investment strategies that mitigate annual, lifetime, and legacy tax liabilities?
	Does your firm offer access to concierge-level planning and elevated resource tiers that reflect the complexity and sophistication of your highest-value contributors?
	Does your firm have a formal succession plan for the leadership team and equity partners to mitigate the risk of leadership disruptions and client defection?
Does your firm need support crafting thoughtful exit strategies for aging partners that also makes room for the next generation of leadership?	

**To start your firm’s customized discovery process, contact Elle Moser: [elle.moser@mystrategyteam.com](mailto:elle.moser@mystrategyteam.com)**

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