THE ATTORNEY'S EDGE

A Virtual Planning Platform for Busy Legal Professionals Delivering Tax, Investment, and Wealth Management Strategies
Let's Define your Plan for Financial Independence Professionally, Personally, and Precisely.

Advanced Strategies Group
What's Your Plan for Financial Independence? [sm]

*Most clients begin their relationship with ASG through our **Financial Independence Blueprint** a one-time planning engagement designed to clarify goals, uncover opportunities, and align strategy. The Attorney's Edge then offers a seamless transition into ongoing support, tailored to your income, complexity, and career stage.*

Program Tier	Your Experience	Designed For	Virtual Service Model Overview	Sample of Services Included
APEX Minimum Annual Revenue Requirement $17,500	Preserve & Expand *Your Edge*	Ultra-successful attorneys and firm leaders whose accumulated wealth reflect decades of excellence, and who recognize the need to structure it with precision to protect heirs, optimize retirement income, and defend against liability, market risk, taxation, and the realities of aging.	Concierge-level planning blending tax mitigation, retirement income optimization, and multi-generational wealth strategies. Access to hedge funds, private equity, and ASG's elite ecosystem, anchored by Charles Schwab's premier infrastructure.	• Personal Financial Portal with advanced reporting • Full ASG Ecosystem access • Customized tax mitigation and implementation • Alternative investment opportunities (hedge funds, private equity) • Legacy and Philanthropic Planning • Comprehensive risk and estate strategies • Tax-free retirement income solutions
PREMIER Minimum Annual Revenue Requirement $12,500	Protect & Grow *Your Edge*	Senior attorneys with a poverty of time whose success and corresponding significant income now demand a sophisticated advisory team to help establish a holistic and integrated planning approach across all aspects of their financial and firm life in the most time-efficient manner possible.	Holistic financial planning for tax efficiency, asset protection, nonqualified benefit integration, and investment optimization. Includes full ASG platform access and strategic partnerships, including Charles Schwab resources.	• Enhanced Personal Financial Portal • Broader ASG Ecosystem access • Integrated tax and compensation planning • Optimized investment strategies (ASG MAPS access) • Asset protection and risk management • Eligibility for ASG Nonqualified Planning
STRATEGIC Minimum Annual Revenue Requirement $7,500	Optimize & Sharpen *Your Edge*	Ambitious, high-performing attorneys with established careers, generating significant and growing income that leads to complexities in managing personal financial goals, increased taxes, and potential for firm partnership buy-in requirements.	Personal financial planning tied to firm retirement plans, equity buy-ins, and cash flow optimization, with access to ASG tools and Schwab-supported investment solutions.	• Digital financial planning and organizational portal • Strategic investment and retirement plan optimization • Equity buy-in and partnership track financial modeling • College accumulation planning (if applicable)
FOUNDATION Minimum Annual Revenue Requirement $2,500	Define & Build *Your Edge*	Early-career attorneys, associates, and law firm staff members who want the support and resources necessary to help them gain clarity, control, and early momentum toward achieving lasting financial stability and eventual independence.	Foundational financial coaching covering budgeting, debt management, insurance basics, and employer benefits participation like the ASG Open(k) Plan.	• Goals-based financial planning software • Foundational financial coaching (budgeting, debt management) • Basic insurance needs analysis • 401(k) Plan optimization and homeownership strategies

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The Foundation tier fee is typically waived for employees of law firms that engage ASG as their retirement plan provider through the ASG Open(k) Plan Design.

Minimum annual revenue requirements can be satisfied through a combination of advisory fees, financial planning fees, insurance commissions, or consulting engagements. Tier eligibility is based on total generated revenue.