

FORMERLY THE CAP-EX GROUP



TRISCEND^{NP}

The Power of a New Perspective

GROW
CAPITAL

RETAIN
TALENT

SERVE
COMMUNITY

**A MORE RESPONSIBLE APPROACH
TO EXECUTIVE BENEFIT PLANNING**

NEEDS IN EXECUTIVE BENEFITS HAVE EVOLVED. WHY NOT THE SOLUTIONS?

Retaining talent amid increased scrutiny for greater fiscal transparency is a major challenge facing nonprofits today. Commonly used corporate-style benefit structures, such as SERPs or 457(f) plans, do not fully appreciate the unique advantages of the nonprofit sector.

THIS ISSUE INSPIRED AN INNOVATIVE APPROACH.

TRANSFORMING THE NONPROFIT EXECUTIVE BENEFIT LANDSCAPE

Unlike traditional plans, the **TRISCEND^{NP} CAP-EX PROGRAM** is designed to return all funding dollars, plus interest, back to the organization while providing the executive competitive retirement benefits.

Customized design, appropriate product selection and unparalleled program administration make the **TRISCEND^{NP} CAP-EX PROGRAM** the preferred alternative to traditional programs.

RESULTS BENEFIT THE ORGANIZATION, EXECUTIVE AND COMMUNITY.



GROW CAPITAL

Transforms benefit expenses into assets

Improves stewardship of financial resources

Returns funds plus interest to the organization



RETAIN TALENT

Attractive and flexible benefits solution

Vesting provisions to improve retention

Potential for greater and more reliable income at retirement



SERVE COMMUNITY

Improved bottom line provides additional resources to invest

Aligns financial incentives with an organization's long-term mission

More favorable perception of Form 990 reporting

TRISCEND^{NP} SPECIALIZES IN FOUR KEY INDUSTRIES

■ HEALTHCARE

■ CREDIT UNION

■ HIGHER EDUCATION

■ OTHER NONPROFIT

TRISCEND^{NP} is the preferred provider of executive benefits for these leading organizations, among others:

**HOSPITAL COUNCIL OF NORTHERN & CENTRAL CALIFORNIA | TEXAS HOSPITAL ASSOCIATION
SOUTH CAROLINA HOSPITAL ASSOCIATION | HOSPITAL ASSOCIATION OF SOUTHERN CALIFORNIA**

USE OUR EXPERTISE TO YOUR BENEFIT CONTACT US FOR A COMPLIMENTARY PLAN ASSESSMENT.

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