

## Spot Bonus Case Study

Congratulations on your spot bonus! Sharing your success with our firm makes us all better. We appreciate your contributions that help make us a world class organization.

**Your Name**

Dan Berve

**Case Name**

Reid Allan and Ann Chernoff

**What is the background on how the client was introduced to our firm?**

Client had been a small client with Dan since his Principal days. Were brought over when Dan joined the firm. Had been a Principal 401k participant that reached out to Dan initially several years ago.

**Who all was involved in the case from start to finish (Balefire team members and outside advisors if applicable)? What were their roles?**

Dan Berve - servicing advisor and relationship  
Dalton Richards - planning  
Brian Smith - stock and tax expertise

**What problems did we help the client solve?**

Tax planning involved with moving large company shares with significant gains over to Balefire. We have been their trusted source for all other needs including connecting with an estate planning attorney and CPA.

**Were there any challenges along the way? How did you overcome them?**

None!

**What was the total revenue generated from this case?** Total annual recurring revenue approx \$60,000.