

2024 Year in Review: Nolan Financial Hit It Out of the Park!

We are excited to share that 2024 was a banner year for Nolan Financial in just about every aspect of our business. Thanks to the trust of our clients and the dedication of all of our employees and partners, the following is a summary of some of the achievements we would like to share.

Record Number of New Nonqualified Plan Clients

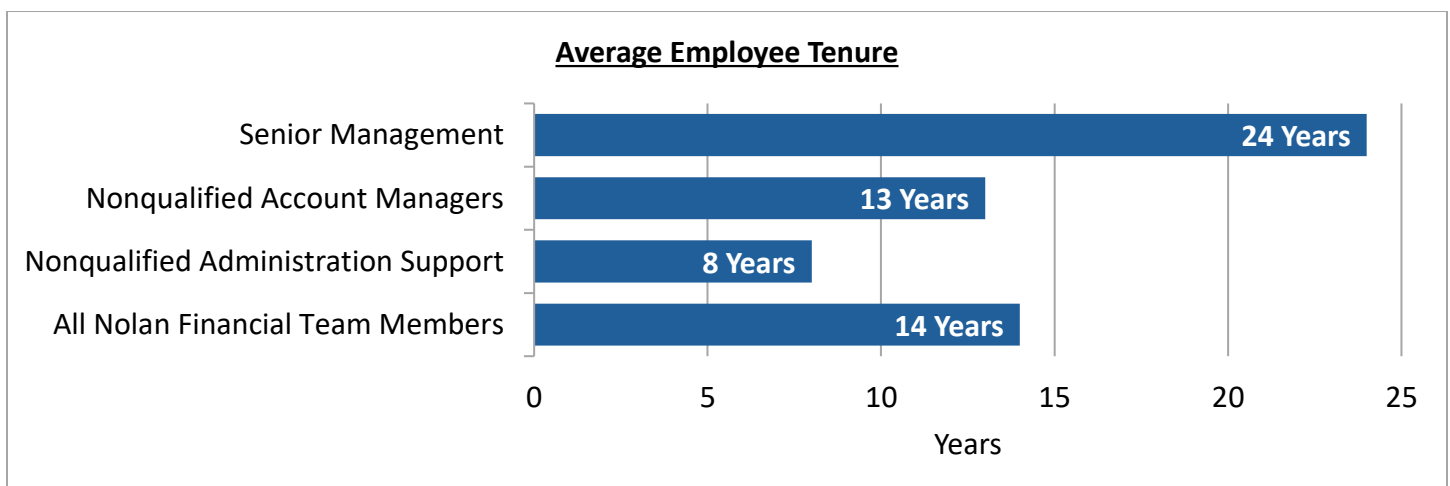
In 2024, Nolan Financial significantly surpassed our previous 35-year high of onboarding new nonqualified plan clients in one year. This is a testament to the trust that our partners have in our ability to provide a high level of quality service to the clients that they refer to us and to the dedication of our employees to make sure that our clients receive the best service possible.

Newly Created Plan Administration Positions

In order to ensure that new and existing clients alike receive the quality service that they expect and deserve, Nolan Financial added two newly created positions to support plan administration. The employees hired into these new positions have hit the ground running and are a welcome addition to the growing Nolan Financial team.

Continued Employee Retention and Tenure

Much of the continued success of Nolan Financial can be attributed to our strong employee retention and the long tenure of our employees. As a result, our valuable clients and partners can feel comfortable knowing that they are dealing with an experienced and dedicated team at all levels.



SOC-1 and SOC-2 Attestations with No Exceptions

Nolan Financial is proud to have completed its nineteenth annual SOC-1, Type 2 audit with no exceptions. Additionally, we completed our first annual SOC-2, Type 2 audit also with no exceptions.

The SOC-1, Type 2 audit is conducted annually by independent outside auditors and tests the effectiveness of Nolan Financial's internal controls, processes, and risk assessments. The audit also includes external penetration testing of Nolan Financial's network infrastructure as well as client and participant web interfaces. The SOC-1 audit results provide assurance to plan sponsors and their independent auditors of the effectiveness of Nolan Financial's control environment and data security. The SOC-2, Type 2 audit report assesses the design and effectiveness of Nolan Financial's procedures, systems, and tools for keeping our data and our client's data secure.

The entire Nolan Financial team would like to thank all of our clients and partners for their trust in our ability to provide the high level of service and commitment that they deserve. We look forward to hitting it out of the park again in 2025!

About Nolan Financial

For more than thirty-five years, Nolan Financial has specialized in the custom design, enrollment, funding, and administration of nonqualified retirement plans for the benefit of the senior executives of mid to large size public, private and tax-exempt organizations. For more information about Nolan Financial, please visit www.nolanfinancial.com.