

2025 Year in Review: Nolan Financial Continues to Raise the Bar!

The dedication and initiative of our employees coupled with the trust of our clients and partners enabled Nolan Financial to experience another remarkable year in 2025. We are excited to share our appreciation and a summary of our achievements:

Client Commitments

In 2025, a few of Nolan Financial's largest clients decided to recontract and continue their 10 year+ relationship. Our clients' continued commitment to Nolan Financial serves as a testament to the value we are able to deliver.

Strategic Initiatives Ensure Alignment with Key Stakeholders

Nolan Financial's board has provided direction for Nolan Financial to maintain our open architecture plan design and funding philosophy that has uniquely positioned Nolan Financial to serve the long-term interest of our clients, partners and employees.

Promotions for Senior Management Team

Nolan Financial extended promotions to several members of the senior management team in 2025. These investments ensure that new and existing clients receive the continuity and quality of service that they expect and deserve.

SOC-1 and SOC-2 Attestations with No Exceptions

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

The SOC audits are conducted annually by independent outside auditors and test the effectiveness of Nolan Financial's internal controls, processes, risk assessments, data and network security. The audits also include external penetration testing of Nolan Financial's network infrastructure as well as client and participant web portals.

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 another year of excellence in 2026!

About Nolan Financial

For almost thirty-seven 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.