

The Universal Tax Problem



Three Different Paths. One Expensive Problem.

Examples are hypothetical and for educational and illustrative purposes only. Results are not guaranteed and will vary based on individual circumstances, timing, and applicable tax laws.



Scenario 1:

You've built a \$15M business over 20 years. Sale closes next year.

Potential Tax bill:
\$4M+



Scenario 2:

You're a tech executive. Your stock options vest in 18 months. Current value: \$8M.

Potential Tax hit:
\$2M+



Scenario 3:

You joined a startup early. Your equity stake is now worth \$12M. You need to diversify.

Potential Tax consequence:
\$3M+

SAME PROBLEM, DIFFERENT ORIGINS.



Here's what they all have in common

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the difference between planning
ahead versus reacting after the fact
may be significant, depending on
structure, timing, and applicable tax
law.

**Most people in these
situations think:**

“

I'll deal with taxes when it happens.



**The ones who tend to
retain more wealth think:**

“

How do I position things now to manage
what's coming?

The Potential Solution

What if an investment approach aimed to track market exposure while using tax-aware techniques to help manage capital gains?



If you're:

- Planning to sell a business in the next 2-3 years
- Expecting a significant liquidity event from equity compensation
- Holding a concentrated position, you need to diversify

The conversation you're not having might be the most expensive one.



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