

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:

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I'll deal with taxes when it happens.



The ones who tend to retain more wealth think:

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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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