KINNEY MUNRO

THE CONCENTRATED POSITION PROBLEM

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LET ME PAINT A PICTURE

You've worked for 15 years.

You've been smart.

You've saved and invested.

BUT

60% of your net worth is in one stock.

SWIPE

MAYBE YOU

👉 Founded a company and still hold significant equity

👉 Rose through the ranks and accumulated restricted stock

👉 Joined early and your employee shares are now worth millions

Your financial advisor keeps saying:

"You need to diversify."

You know they're right.

But every scenario you run shows a significant tax bill

just to de-risk your portfolio.

SO YOU'RE STUCK

Too concentrated to sleep well. Too expensive to diversify.

Here's what can change for investors

who break through this paralysis and plan ahead:

They discover there are investment approaches specifically designed for this problem—that may allow for diversification while seeking to actively managing tax exposure over time rather than just accepting tax costs all at once.

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THESE APPROACHES MAY WORK FOR:

Concentrated positions of $3M+

Those who can plan 12-18 months ahead

People who want to diversify while considering the timing and impact of potential tax liabilities

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.

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THE QUESTION ISN'T

"SHOULD I DIVERSIFY?"

THE QUESTION IS

"HOW CAN I DIVERSIFY IN A

TAX-EFFICIENT MANNER?"

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