



THE \$5 MILLION QUESTION



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YOU'RE SITTING ON A

concentrated stock position worth \$5M.

Maybe it's





YOUR ADVISOR SAYS:

“You need to diversify.”



YOUR ACCOUNTANT SAYS:

“That’ll trigger a huge tax bill.”

So, you wait. And wait. And wait.





Meanwhile, a large portion of your net worth is tied to one stock.

**THIS IS THE
DIVERSIFICATION DILEMMA.**

You know you should de-risk, but the tax consequences feel paralyzing.

HERE IS WHAT

MOST PEOPLE DON'T REALIZE

there are planning approaches that allow you to diversify while actively managing the tax impact—not just accepting it.

THIS MATTERS IF YOU:

Hold stock representing 30%+ of your net worth

Are an executive with concentrated equity compensation

Acquired a concentrated position through a business sale or merger



The risk of staying
concentrated?



The risk of traditional
diversification?



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. Investing involves risk, including the potential loss of principal. This content is for informational purposes only and does not constitute investment, legal, or tax advice.

THE ALTERNATIVE?

Strategic positioning
that addresses both –
with proper professional
guidance.



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