

# WHEN SHOULD I START THINKING ABOUT THE TAX IMPLICATIONS?



# THAT'S THE QUESTION I GET FROM:



Business owners starting the exit process



Executives watching their equity grow



Early employees sitting on concentrated stock positions

# 12-18 MONTHS BEFORE THE TAXABLE EVENT

Here's the uncomfortable answer:

After the transaction closes?

You can still plan, but the range of options narrows and you've probably already left money on the table.

# THE MATH

\$10M gain  $\times$  27% effective tax rate  
= \$2.7M in estimated tax liability

## WITH ADVANCE POSITIONING?

That number may look different,  
depending on structure and timing.

# THREE SCENARIOS WHERE TIMING MATTERS MOST



## BUSINESS OWNERS:

Between “thinking about selling” and “letter of intent”



## EXECUTIVES:

Between “equity granted” and “vesting date”



## CONCENTRATED HOLDERS:

Before you’re forced to diversify

GENERALLY, THE INVESTORS  
WHO PRESERVE THE MOST  
WEALTH **AREN'T SMARTER.**

**THEY JUST STARTED  
PLANNING EARLIER.**

*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.*





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