



THREE DIFFERENT STORIES, SAME SOLUTION



THREE COMPLETELY **DIFFERENT** SITUATIONS.



CLIENT A:

Built and sold a manufacturing business. Exit price: **\$18M**. Worried about the tax bill.



CLIENT B:

C-suite executive at a pre-IPO company. Options worth **\$6M** at current valuation. Liquidity event expected in 12 months.



CLIENT C:

Early employee at a company that went public. Holding **\$10M** in company stock. Needs to diversify but dreading the tax consequence.

All facing the same question:

“HOW DO I KEEP MORE OF WHAT I’VE BUILT?”

TRADITIONAL ANSWER

"Pay your taxes and
move on."



STRATEGIC ANSWER

"Position your
wealth to offset
those gains before
they're realized."



THE POTENTIAL DIFFERENCE?

It could be 15-25% of the taxable amount that stays in your pocket instead of going to taxes, depending on the circumstances.

On a \$10M gain,
that's \$1.5M - \$2.5M.

WHO NEEDS TO HEAR THIS:

A**BUSINESS OWNERS:**

Business owners
12-24 months
from exit

B**EXECUTIVES:**

Executives
approaching
vesting dates or
liquidity events

C**CONCENTRATED
HOLDERS:**

Anyone with a
concentrated
position needing
diversification



• THE WEALTH **YOU PRESERVE**
ISN'T JUST ABOUT **WHAT YOU EARN.**

**IT'S ABOUT WHAT YOU
KEEP AFTER TAXES.**

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