



# 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.

*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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