MOSSADAMS

LEVERAGE YOUR EQUITY COMPENSATION

Secure Your Financial Future

Our educational presentations are tailored for your unique situation and needs as you prepare for an IPO, M&A, or other transaction. Presentations are available in-person and virtually for small groups comprising executive and management teams or larger employee education sessions.

PRESENTATIONS PROVIDE INSIGHTS TO:

- Make tax and liquidity decisions within the context of your broader financial picture and long-term goals
- Avoid losing sight of investment risks while pursuing tax savings and consider specific sales options
- Explore strategies for exercising or selling incentive stock options (ISOs), nonqualified stock options (NSOs), and restricted stock units (RSUs) as they vest
- Avoid or prevail in state residency audits with proper planning
- Reduce estate taxes by aligning your estate planning and charitable-giving strategies
- Prepare for tax law changes

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KEY TOPICS INCLUDE:

- Tax strategies for ISOs
- Portfolio and risk management considerations when divesting concentrated stock
- Qualified small business stock (QSBS)
- Advanced topics in QSBS
- Residency transition planning
- Estate planning with your lifetime exemption
- Philanthropic planning alternatives for concentrated stock
- 10(b)5-1 considerations