

Executive Compensation

Strategies for Concentrated Stock and Stock Options

Jeff and Ruth have over 30 years combined experience helping senior executives to manage and diversify their concentrated stock positions. We custom-design staged, tax sensitive diversification strategies for complicated concentrated stock positions. If you have concentrated stock in many places, which shares should you diversify when, and how?

- Understanding different types of company stock options

- Stock options strategy: understanding the time value, leverage, and tax implications of your company stock options

- Proactive communications with your accountant before you exercise your stock options

- Restricted stock strategy

- 10b5-1(c) trading plans

- Concentrated stock in company retirement plans

- Covered call writing

- Collars/Prepaid Forwards

- Charitable gifting strategies for concentrated stock

- Exit Planning





Let's Chat

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