

PROBLEM

A number of our clients are serial entrepreneurs or deeply involved in venture capital. Both of these career paths come with numerous demands as well as many opportunities and risks associated with tax planning. Without expertise and experience in tackling these complex tax issues, how can you be sure you are making the right choices for your business and your finances?

SOLUTION

Our clients are highly capable people, but they often do not have deep tax expertise or time to develop it. Through our decades of work in wealth management, we are familiar with the issues facing entrepreneurs and venture capitalists.

We have helped improve after tax outcomes by:

- ◆ Negotiating employment agreements, including stock compensation plans
- ◆ Managing stock options, including dealing with early exercise of founder options and related 83 (b) filings
- ◆ Ensuring maximum application of qualified small business stock exclusions
- ◆ Using incomplete non-grantor trusts to create state tax savings

We have helped clients focus on their strengths by:

- ◆ Managing cash flow, including commitments to privately-held companies and VC funds
- ◆ Coordinating GRAT administration and annuity payments
- ◆ Providing income tax and wealth transfer advice
- ◆ Managing diversified investment portfolios



RESULT

Even highly-competent and successful executives may not be able to navigate these complex issues and opportunities, nor do they generally want to devote the time required to become expert in tax law and tax planning alternatives. Through their dedicated team, they have access to a wealth of knowledge and experience dealing with intricate and elaborate tax scenarios. Knowing their taxes are optimized, these clients can focus their energy on what they are passionate about.

Disclosure Information:

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