



## **Financial Planning Considerations for Liquidity Events**

- **Concentrated Stock Diversification Strategies**
  - Minimizing Taxes
  - Optimum Insider Stock Trading Plan Structure (10b5-1 plans)
  - Hedging Vehicles (options, collars, forward contracts, etc.)
- **Scenario-based Income Tax Planning**
  - Pre-IPO Stock and Option Actions to Minimize Taxes
  - On-going ISO and NQ Option Exercise Strategies
  - Alternative Minimum Tax (AMT) Planning
- **Gift and Estate Tax Minimization**
  - Effectively Using Exemptions
  - Titling Assets and Beneficiary Designations
  - Trusts and Wills
- **Personal Financial Planning**
  - Retirement Planning & Projections
  - Asset Protection, Risk Management and Insurance Issues
  - Educational Funding & 529 Plans
- **Investments**
  - Funds, ETFs, Individual Stocks & Bonds
  - Passive and Active Strategies
  - Downside Protection
- **Philanthropic Planning**
  - Tax Saving Opportunities
  - Donor-advised Funds
  - Charitable Trusts and Private Family Foundations

Founders Financial Network is an independent advisory firm providing financial planning services and wealth management for Silicon Valley executives and entrepreneurs. We offer a complimentary initial consultation to discuss your situation and provide recommendations on planning priorities.