



# SIGN UP FOR OUR WEBINAR

## You're Invited: Tax Planning and Tailored Portfolio Solutions for Stock Options and Restricted Stock

Want a second opinion or to learn how to potentially make the most of your stock & stock options? Please join us for our monthly call series: **Planning for Liquidity.**

## ABOUT THE WEBINAR

The topics of conversation are:

- Pre-IPO & M&A Planning
- ISO & NQO Stock Option Planning
- 10b5-1 Plans
- 83b Elections & Rule 144a Services
- Seeking to minimize potential trading liability
- Navigate complex stock positions in retirement
- Ways to manage your new found wealth
- Helping maximize your stock to maximize your wealth



26 March 2024 | 12 PM & 4 PM ET

12pm EST: [Register Here](#)

4pm EST: [Register Here](#)



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