DAVIS
EXECUTIVE WEALTH MANAGEMENT
at Steward Partners

SIGN UP FOR OUR WEBINAR

You're Invited:
Planning For Liquidity

Are you a past or present employee of a public company and have questions on how to manage a concentrated stock or stock option position? Please join us for our monthly call series: Planning For Liquidity & Concentrated Equity Risk Management

ABOUT THE WEBINAR

The topics of conversation are:

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

27 Feb 2024 | 12 PM & 4 PM ET

Register Link: 12 PM ET

https://raymondjames.zoom.us/webinar/register/WN_nYA5puSGQ7WuTBNWs2GisA

Register Link: 4 PM ET

https://raymondjames.zoom.us/webinar/register/WN_41m6RP5MQ06HZbwND1-74g

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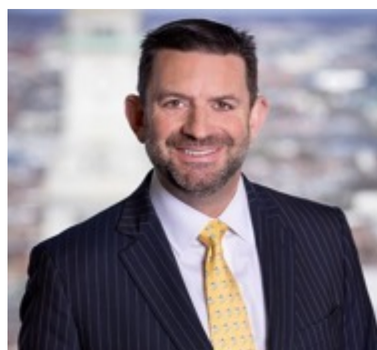

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