Getting answers on the way to the top

EARLY-TO-MID CAREER • VP/SVP/EVP

Your Core Question: *How do I orchestrate the mix of cash and equity compensation, along with a complex benefit plan to achieve the best outcome for my family?*

"With pressing issues every day at work and home, I don't seem to have time to proactively address the key elements of my financial life!"

All day you deal with urgent matters at work and home. Focusing on the crucial matters around financial well-being are deferred since spending time for yourself or with family is more important.

Story Capital can help relieve your stress by coordinating important financial management matters and keeping you apprized.

"I know I'm not there yet, but I have no idea when I can financially afford to retire or even start thinking about retiring!"

Work becomes more fun when you know you don't "have to" work anymore, but how do you know when you will cross that bridge.

Plan with us to set and achieve your desired retirement date and objectives by modeling work-life scenarios to develop your future path.

"My family's current advisory team has done a good job, but I'm worried they aren't keeping pace with the complexity our situation commands."

At VP+ levels, you know that maintaining sub-optimal counsel is a threat to the ideal achievement of your life objectives. Does the current team serving your family have the exposure to this level of compensation complexity and overall asset optimization? You understand getting a second opinion is the right decision, but would it be painful?

Get a trained team with cultivated/effective knowledge of executive compensation complexity who are experts at providing painless, no-obligation second opinions.

"I feel so disorganized in the realm of personal finance. I just can't get a handle on it!"

Unguided, there is not enough time to truly focus on the important, but not urgent, matters of your personal affairs.

Our experience can bring organization and prioritization to you and your family.

WELCOME TO THE MAJORS!
YOU'RE IN THE BIG LEAGUE NOW!

IF THIS IS YOU, CLICK HERE

PLEASE NOTE: All capabilities are provided without the requirement of bringing assets under management or disrupting existing relationship with trusted advisors. In fairness, the result of our work often leads to a client's decision to move forward with a higher-level, refreshed approach and advisory team. Doing so is our client's decision, not our requirement. Where possible, we enjoy working with both spouses and all adult children.

STORY CAPITAL, LLC

We will help you write your Next Chapter.

WITH STORY CAPITAL'S EXPERIENCE, YOU GET THE FOLLOWING BENEFICIAL FEATURES:

- Technologically leading edge cash flow-based personal financial modeling.
  - Review any financial scenario you can imagine in interactive, graphic detail.
    The construction of the financial model is a beneficial tool for both your family and your advisory team, since Story Capital uses the model to provide proper context as circumstances evolve along your journey.
- A transition from a **reactive** to **proactive** posture about your financial management.
- Refined understanding of portfolio risk, proper diversification, and achievable return.
- Education on the fine points of the art and science of equity compensation overall and a tailored employer stock management strategy to suit your family's needs and aspirations.
- A refined cash flow management system to achieve low stress in personal cash flow management.
- A focus on building liquidity to meet the following goals:
  - Maximized career flexibility
  - Suitable emergency funding
  - Capturing opportunities presented by the markets or those which are self-discovered
  - The ability to remain calm in volatile markets and disruptive events

IF THIS IS YOU,
CLICK HERE

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START YOUR STORY @ STORYCAPITAL.COM OR CALL 952-657-7200

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