

Time to optimize at the pinnacle

C-SUITE • NAMED EXECUTIVE OFFICER



Your Core Question: *How can I handle SEC regulations and unwritten corporate expectations around managing my company stock and options?*

“My compensation is public knowledge, and now my children know too!”

Now you require a sophisticated planning team familiar with the subtlety of having publicly reportable income.

Implement our experience with NEOs to help you through the nuances of your position.

“My estate and legacy planning are so much more complex than my current documents acknowledge, but I’m not sure what the next steps are.”

Developing a detailed review of your legacy planning that likely incorporates asset protection planning and self-settled trusts in jurisdictions, like South Dakota, is paramount.

We generate refined estate planning solutions to help identify your best option.

“I am subject to a holding requirement of my company’s stock that is publicly reported. How can I deal with that?”

Holding requirements force you to consider how and when you will sell some of your positions in your company’s stock and the most tax-effective way to hold shares to meet the requirements.

Create the most tax-effective way to meet your holding requirement and benefit from our extensive knowledge of the 10b5-1 Trading Plan to create a confident strategy specifically for you.

“I am seriously lacking in time to handle some of the personal things in my life like family travel and billpay.”

It might be time for you to consider a broader array of personal service assistance. This might also include financial and non-financial help for parents.

Get creative solutions to the problems, opportunities, and responsibilities you no longer desire to actively manage.

IT’S NOT ABOUT THE MONEY ANYMORE!

 **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 and achievable return.
- Education on the fine points of the art and science of equity compensation overall plus a tailored employer stock management strategy to suit your family's needs and goals.
- A refined cash flow management system to achieve low stress in personal cash flow management.
- Estate and legacy planning to reflect aspirations developed in your Transcendent Wealth analysis.
- 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 events
- Execution of a "Transcendent Wealth" analysis that quantifies how much, if any, excess wealth, in today's dollars, is presently accumulated beyond what is needed to maintain your desired lifestyle plus emergency/opportunity contingencies.
- Optimization of all elements of company benefit plan elections to maximize the most tax-effective cash flow opportunities being built into your retirement cash flow plan.
- Initiating multi-generational planning with your adult children to enhance family conversation and grow your children's financial literacy.

 **IF THIS IS YOU,
CLICK HERE**
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Additional valuable benefits include:

- Knowledge of the pros and cons of creating a Blind Investment Trust.
- Defined, refined, and tax-optimized Holding Requirement portfolio management.
- An optimal 10b5-1 Trading Plan to coincide with your desired diversification strategy and both the "written" regulations of SEC and company compliance as well as the nuances of the "unwritten" policy expectations of your position.
- A refined Legacy Planning process which fully anticipates that your worth already does or soon will exceed the \$11,580,000 tax credit for individuals or \$23,160,000 for married couples.
- A range of special personal services such as:
 - Bookkeeping and Bill Pay
 - Party, vacation, or philanthropic travel planning
 - Financial and non-financial assistance to parents
 - State residency documentation
 - Household payroll and property management

START YOUR STORY @ [STORYCAPITAL.COM](https://storycapital.com) OR CALL 952-657-7200

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