



{ Stock Option Planning }

» ARE STOCK OPTIONS A LARGE PART OF YOUR COMPENSATION AND NET WORTH?

Many executives and employees have significant resources in stock options, appreciation rights, and discount purchase plans. Yet proper planning for these assets can be complicated, and many individuals have been hurt financially by making the wrong decisions or following the wrong advice.

» ASK YOURSELF THESE QUESTIONS:

- When is the best time to exercise options and rights?
- What is the tax effect of exercising?
- What is the tax effect of selling after exercise?
- Does the alternative minimum tax come into play?
- How do I pay for the options, and the resulting taxes?
- Do I sell the stock after exercise, or should I hold it?
- Which shares should I sell first?
- What potential risks are involved?
- Is there a strategy that will net more, and reduce taxes?

» HOW WE CAN HELP

Our advisors develop individual option and stock strategies based on your particular situation and goals. You'll get concrete recommendations and an action plan that will help you achieve higher after-tax wealth from your stock based compensation plans, and reduce your risk of making the wrong move.

» WHY CHOOSE REDW STANLEY FINANCIAL ADVISORS?

We are qualified and experienced in planning for stock based compensation. Our staff includes CPA's, Personal Financial Specialists, and Certified Financial Planners. Our published team has been recognized as among the best in their fields, but you can judge for yourself.

We don't sell products or take commissions. We are fee only, and because of that you can be confident that our recommendations and advice are based on your needs and with your success in mind. Call us for a free, no obligation, no pressure assessment.

At REDW Stanley Financial Advisors, integrity counts.

REDW Stanley
Financial Advisors LLC
An SEC Subsidiary of REDW The Rogoff Firm

CERTIFIED PUBLIC ACCOUNTANTS | BUSINESS & FINANCIAL ADVISORS

INTEGRITY COUNTS.

6401 JEFFERSON STREET NE, ALBUQUERQUE, NEW MEXICO 87109 | 505.998.3200 | REDW.COM