



With Econ Wealth Management, we help turn your workplace equity into a coordinated strategy designed to manage taxes, reduce risk, and build long-term wealth.

Managing Employer Equity



Stock Options - ISOs and NQSOs

- Optimize exercise timing and tax impact.
- Navigate AMT and withholding considerations.
- Align exercises with diversification and cash flow needs.



Restricted Stock Units (RSUs)

- Plan around vesting and tax exposure.
- Evaluate when to hold versus sell.
- Coordinate sales with the broader tax plan.



Employee Stock Purchase Plan (ESPP)

- Maximize the tax benefits of your plan.
- Evaluate qualifying versus disqualifying sales.
- Integrate shares into your diversification strategy.



Concentrated Positions

- Identify concentration and downside risk.
- Build a tax efficient diversification plan.
- Explore charitable and gifting strategies.

Advanced Strategies



Elect



Preserve



Coordinate

We turn complex employer equity into a coordinated wealth strategy. By connecting tax planning, investment management, and long term goals, we help you make smarter decisions with your company stock.

Important Disclosures: Econ Wealth Management provides general investment education and recommendations. We do not guarantee any specific investment results. Services may be offered in a fiduciary capacity where applicable. Econ Wealth may recommend third-party service providers; we do not receive compensation from such providers unless otherwise disclosed. Econ Wealth Management is not engaged in the practice tax preparation and no comments should be construed as tax advice.. Tax information provided is general in nature. Always consult a tax professional regarding your specific tax situation.