

Portfolio transition after concentrated stock exits

Executive Insight

Portfolio transition after concentrated stock exits is one of the most critical inflection points in a client's financial life. The difference between reactive decisions and structured planning can result in millions of dollars of long-term impact.

Client Scenario

A founder exits with \$5M. Without planning, they face concentrated risk, tax drag, and emotional decision-making. With a structured approach, they transition into a diversified, tax-aware portfolio with long-term sustainability.

Strategic Framework

1. Liquidity segmentation
2. Tax layering strategy
3. Risk-adjusted allocation
4. Behavioral guardrails
5. Ongoing advisory cadence

Advanced Tax Strategy

Opportunities may include installment sales, charitable giving vehicles, asset location optimization, and timing of income recognition to reduce overall tax burden.

Portfolio Architecture

Core (public markets), Satellite (alternatives), and Income layers structured around time horizon and liquidity needs.

Key Risks to Avoid

Overconfidence post-exit, tax missteps, over-allocation to illiquid assets, and lack of coordination between CPA and advisor.

InVestra Approach

Integrated planning across tax, investments, and long-term wealth strategy with a focus on preserving capital and creating optionality.

Next Steps

Schedule a strategy session, build a custom plan, and implement within a defined 90-day execution window.

Contact InVestra

Headquarters:
1431 Riverplace Blvd #910
Jacksonville, FL 32207

Phone: 904-880-7878
Website: www.investra.com