How to reduce capital gains tax after exit

Executive Insight
How to reduce capital gains tax after exit 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

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