

InVestra

Target Company Universe and Campaign Map

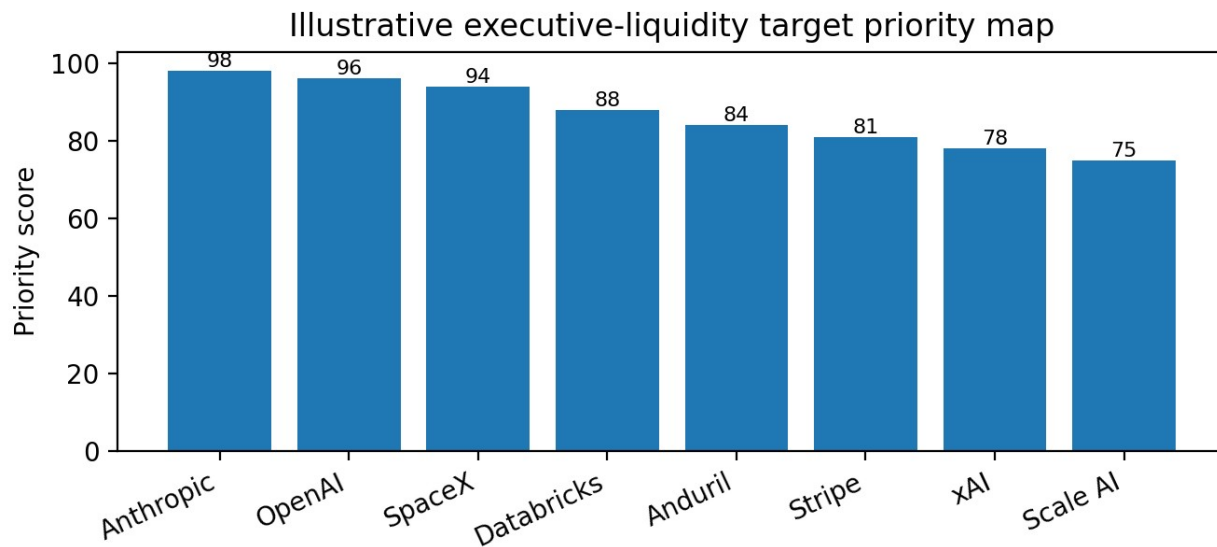
Company-by-company pipeline for executive liquidity advisory growth

Internal Growth Report | Prepared for James Brown and InVestra leadership | June 12, 2026

Important: This package is designed to help InVestra scale a repeatable executive-liquidity advisory model. It is not a recommendation to buy, sell, or hold any security. Any client-facing language should be reviewed by compliance, legal, tax, and investment-policy professionals before distribution.

Purpose

This report turns the SpaceX proof point into a ranked outreach and content-production pipeline. The objective is not to speculate on IPO timing. The objective is to identify where executives are most likely to need concentrated-equity, tax, estate, privacy, and diversification planning before liquidity becomes urgent.



Priority Target Universe

Company	Sector	Why it matters	Executive segments	First asset to produce
Anthropic	AI model/platform	Public-market readiness; compute; safety governance	C-suite, V-suite, research, infra, product, GTM	Company liquidity report + personal equity inventory
OpenAI	AI platform/infrastructure	Public-market readiness; compute commitments; governance	Execs, product, research, enterprise, infrastructure	Company liquidity report + tax/estate workplan
SpaceX / Starlink	Space and communications	Existing proof point; IPO/secondary liquidity narrative	Known relationships, senior technical leaders, aerospace executives	Anonymized case study + post-liquidity reviews
Databricks	Data/AI infrastructure	Large private valuation; enterprise AI platform relevance	Engineering, GTM, data-platform executives	AI infrastructure wealth-event briefing
Anduril	Defense technology	Defense AI, autonomy, government contracts, founder-led growth	Defense-tech leadership and senior operators	Defense-tech executive liquidity memo
Stripe	Fintech/payments	Private liquidity history; global payments scale	Finance, product, platform, legal, compliance executives	Concentrated private-equity planning brief
xAI	AI infrastructure/model platform	Founder-linked ecosystem, compute scale, strategic volatility	AI/infra leadership and early equity holders	AI founder-led platform risk memo
Scale AI	AI data/infrastructure	AI supply chain and enterprise/government demand	AI data, govtech, operations leaders	AI data-infrastructure liquidity memo
Perplexity	AI search/consumer	Consumer AI, search economics, monetization, capital needs	Product, growth, search, enterprise leaders	Consumer AI executive planning checklist
CoreWeave	AI compute/cloud	Compute capacity, capex, customer concentration, public-market comparables	Infrastructure, finance, operations leaders	Compute-infrastructure wealth planning brief

Campaign Waves

Wave	Target	Core message	Assets
Wave 1	Known warm relationships and referrals	Private briefing: what the SpaceX outcome taught us about pre-liquidity planning	Invitation email, 1-page checklist, executive consult
Wave 2	Anthropic/OpenAI senior leaders	You can plan before final IPO terms exist	Company-specific report, equity inventory template, 30-minute strategy call
Wave 3	Other AI/space/defense/fintech leaders	Do not let private wealth become unmanaged family balance-sheet risk	Sector brief, webinar, discovery script
Wave 4	Professional centers of influence	Bring InVestra in before the tax, estate, and concentration decisions become urgent	CPA/estate attorney referral memo and partner dinner agenda

Scoring Criteria

- Liquidity signal: IPO filing, confidential S-1 activity, tender offer, recurring secondary activity, or public-market readiness discussion.
- Wealth concentration signal: likely early employees, option holders, restricted equity, or high private valuation exposure.
- Planning complexity: AMT, QSBS, state domicile, lockups, founder/insider status, transfer restrictions, estate planning, charitable intent, privacy, litigation risk, and family governance.
- Relationship accessibility: existing client/referral overlap, advisor relationship, geographic cluster, alumni network, or professional-center-of-influence connection.
- Narrative fit: ability to translate company-specific complexity into InVestra's fiduciary, white-glove planning language.

Weekly Operating Rhythm

Meeting	Participants	Agenda	Output
Monday intelligence standup	Research, advisors, growth	News, filings, funding, liquidity rumors, client questions	Priority queue updates
Wednesday advisor enablement	Advisors, compliance liaison	Review scripts, objections, live cases, source notes	Advisor-ready briefs
Friday pipeline review	Leadership, growth, advisors	Meetings booked, referrals, next-company reports, bottlenecks	Next-week action list

Source Notes and Use Controls

- InVestra internal SpaceX liquidity-event planning materials, May-June 2026.
- InVestra AI Liquidity Report Package for Anthropic and OpenAI, June 12, 2026.
- Axios, Reuters, The Guardian, Business Insider, and other public-market coverage of Anthropic and OpenAI confidential IPO filings and 2026 funding activity, reviewed June 12, 2026.
- SEC Rule 144 and Form 144 guidance; IRS and tax-practitioner materials regarding incentive stock options, alternative minimum tax, and qualified small business stock; all planning should be confirmed by qualified counsel and tax professionals.

Use control: SpaceX references should remain anonymized and strategic. Do not disclose individual client outcomes, client identities, securities holdings, or portfolio details without written approval and compliance review.