

# InVestra

## Executive Liquidity Intelligence Package

---

Export index for InVestra growth-system deliverables

**Export Control Sheet | 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.*

## Package Overview

Deliverable status: DOCX and PDF versions have been generated for the reports listed below. The package turns the SpaceX liquidity-event playbook and the Anthropic/OpenAI AI-liquidity reports into a repeatable growth system for serving more executives.

## Reports Included

Report	Format	Status
InVestra_Executive_Liquidity_Intelligence_System_Blueprint	DOCX + PDF	Ready for leadership/compliance review.
InVestra_Target_Company_Universe_and_Campaign_Map	DOCX + PDF	Ready for leadership/compliance review.
InVestra_Executive_Outreach_Kit	DOCX + PDF	Ready for leadership/compliance review.
InVestra_Advisor_Operating_Model_and_Compliance_Guardrails	DOCX + PDF	Ready for leadership/compliance review.
InVestra_90_Day_Implementation_Roadmap	DOCX + PDF	Ready for leadership/compliance review.

## Distribution Notes

- Use the Blueprint, Target Map, Operating Model, and Roadmap as internal leadership materials.
- Use the Outreach Kit only after compliance approves email language, case-study references, and disclosure blocks.
- Do not include client-specific SpaceX outcomes in client-facing materials until verified and approved.
- Update company-specific facts before any external distribution.

## 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.*