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StockOpter® Pro

EQUITY COMPENSATION TAX PLANNING & STRATEGY MODELING



StockOpter® Pro is the best tool for...

- ✓ Developing goal-based and tax efficient diversification strategies with immediate action plans
- ✓ Modeling strategies over a 15 year horizon using different stock price indices
- ✓ Targeting client cash-flow or diversification goals and optimizing for AMT tax efficiency
- ✓ Answering client specific strategy questions:
 - ✓ How much can I exercise in this tax bracket?
 - ✓ What 10b5-1 stock price targets should I use?
 - ✓ How many ISOs can I exercise up to the AMT limit?
 - ✓ What do I need to do to diversify 90% over 15 years?

StockOpter® Pro

StockOpter® Pro is an Excel based equity compensation planning application that is ideal for modeling HNW diversification strategies. It enables users to quickly develop employee stock option, restricted stock & company share diversification scenarios and optimize them for tax & cash-flow efficiency.

A full tax engine and built-in functionality assures accurate calculations and significantly reduces the time required to illustrate the after-tax effects of different equity compensation strategies. Visit stockopter.com to demo & compare StockOpter.com and StockOpter Pro.

