



StockOpter®

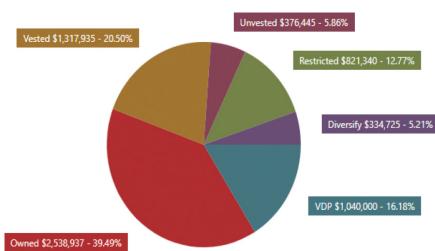
EQUITY COMPENSATION RISK ANALYSIS & TAX PLANNING

StockOpter.com is an online platform for providing stock plan participants with comprehensive equity compensation guidance.

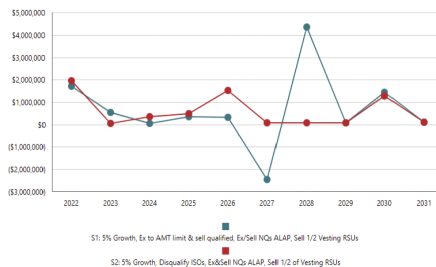
StockOpter enables financial advisors to:

- Attract and Engage Stock Plan Participants
- Efficiently Manage Client Equity Compensation Holdings
- Generate and Justify AUM and Planning Fees
- Help Clients Make Timely and Informed Diversification Choices

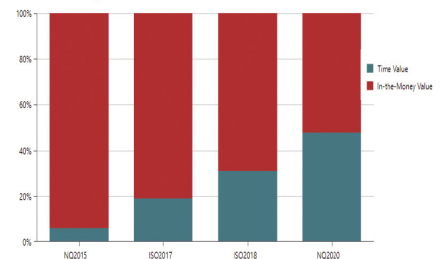
Post Strategy After-Tax Values



After Tax Cash Flow



Insight Ratios at \$182.50 on 4/4/2022



StockOpter functionality

- Organizes and Tracks Employer Stock and Option Positions
- Calculates Values and Illustrates Risks
- Creates Brandable Client Deliverables and Shows “What-Ifs”
- Establishes and Monitors Exercise/Sell Criteria and Emails Alerts (Tracks 10b5-1 Plans)
- Models Multi-Year Exercise/Sell Strategies
- Calculates Tax Details (e.g., AMT + Brackets) and Optimizes for Taxes and Cash Flow



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