



Managing Concentrated Stock Wealth: An Advisor's Guide to Building Customized Solutions (Bloomberg Financial)

Tim Kochis, Michael J. Lewis

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The Methodical Compendium of Concentrated Portfolio Options

Managing Concentrated Stock Wealth, Second Edition is the adviser's guide to skillfully managing the risk and opportunity presented by concentrated stock holdings. Written by Tim Kochis, a recognized leader in financial planning, this book walks you through twenty strategies for managing concentrated stock wealth. Each strategy equips you with the tools and information you need to preserve and grow your clients' wealth. Supported with examples from the author's forty years of experience, this practical resource shows you the available options, the best order for clients to review those options, and the reasons why some options are better than others. Kochis addresses common obstacles—such as securities law, taxes, and psychological resistance—and shows you the strategies and execution to prevail.

This new second edition includes:

- Updated references, calculations, and illustrations regarding the latest tax laws
- Revised coverage of derivatives strategies and more examples of potential blind spots
- Tactics to convince some clients to diversify their portfolios and optimize their wealth
- Techniques to exploit concentration in pursuance of greater wealth

They say that you should never put all of your eggs in one basket, but compensation packages, inheritances, IPOs, buyouts, and other situations leave many investors holding a significant portion of their wealth in one stock—often leaving their portfolios in a dangerous position. *Managing Concentrated Stock Wealth, Second Edition* shows you how to manage the risks and turn a precarious position into an advantage.



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