



STOCK OPTION PLANNING

Planning how to make the most of your stock options can be confusing. Different types of stock options have different tax consequences. In order to maximize the value you receive from exercising the options, a well-timed plan is a must.

FRKPC CAN HELP

At FRKPC, our tax professionals understand the types of stock options available. We bring our tax knowledge together with your best intuition on stock prices to create an exercise calendar that will net you the largest benefit from your option, whether they are Incentive or Non-qualified Stock Options.

WHAT WE CAN DO FOR YOU

Our experience helping clients time the sale of stock options enables them to realize the maximum net value from the stock. This includes not only exercising the option at the right stock price, but also minimizing your tax exposure. We project your income over a period of years to determine the optimal time to sell the stocks so this can be achieved.

Everything we do to assist in the planning of exercising your stock options is designed to ensure you get the most value from these sales. Other considerations we also take into account are your special needs such as funding a college education or purchase of a new house. These items also help us to create the most financially advantageous decisions for you.

Although we make no recommendations regarding stock value assumptions, we time the exercise of incentive stock options to either reduce or eliminate the Alternative Minimum Tax. Likewise, we work with the non-qualified stock options to prevent the spiking of ordinary income tax rates.

STAFF

FRKPC staff receives continuous updates on changing tax laws. This ensures our clients are taking full advantage of every tax saving opportunity available to them. We have certified financial planners and tax attorneys on staff. Our personalized services will ensure you receive the attention these matters require.

CONTACT US

To learn more about how we can help you with your stock option planning, please contact:

713-260-5230