

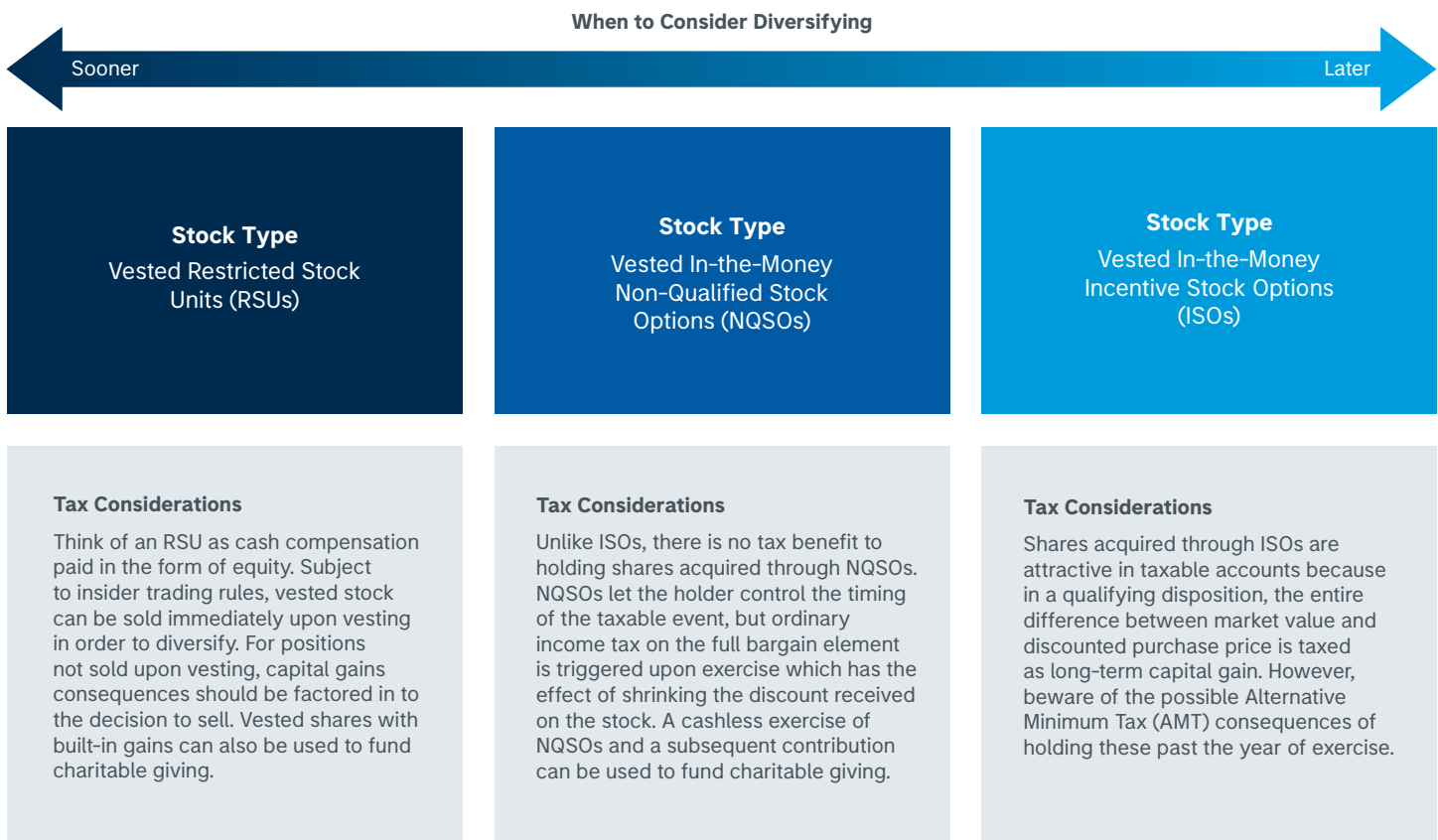
LEARN | When to Consider Diversifying Concentrated Shares

Stock that is awarded as part of an incentive compensation plan presents unique challenges for investors. Help your clients understand the optimal time to consider diversifying their concentrated shares.

Key Takeaway

Not all shares are created equally. Learn about the tax considerations of different types of stock awards and the best time to consider diversifying.

When to Consider Diversifying Concentrated Shares



Next Step

Identify clients who work at publicly traded companies, and set up time to speak with them about their holdings.

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