



CLEARSTONE
WEALTH MANAGEMENT

PROFESSIONALS & EXECUTIVES

In the course of their career, executives and professionals are presented with a number of unique compensation and employment opportunities. It is not unusual for them to be offered stock options or stock positions, deferred compensation and other executive benefits. As a result they can be managing complicated portfolios with private holdings and concentrated stock positions.

We help executives and professionals understand and effectively plan for the complex financial situations they face including financial and tax planning, restricted stock and options based compensation, cash management, divestiture and diversification strategies.