

Understanding the challenges and opportunities of a career in engineering, tech, and start-ups.



There are a number of circumstances unique to the engineering and technology field requiring careful planning. Your company may be undergoing a merger or acquisition which can change your compensation and benefits package. Or you may be offered a partnership opportunity, stock options such as ISOs or restricted stock units (RSUs) and need a strategic plan to take full advantage of these and other financial opportunities.

Clearstone Wealth Management can help develop a comprehensive financial strategy that includes these and other equity and compensation options. We'll work with you to create a goal-based plan that addresses the known and anticipated financial needs for you and your family. This plan will incorporate all of your investments, including those held in previous and current retirement plans, the proceeds from ongoing stock liquidations or other significant events, and scheduled bonuses. Together, we will design and implement the right strategy for your ongoing career, your life, and your legacy.

Clearstone's Total Wealth Solutions for professionals in engineering, architecture, tech, and software development

Though every situation is unique, we those in the architectural, engineering and technology industry:

- Manage stock options, deferred compensation, stock appreciation rights, and restricted stock units
- Consolidate 401(k) and other investment accounts to a single, unified strategy
- Evaluate benefit packages and review the pros and cons of different programs
- Provide and update a comprehensive goal-based financial plan and wealth management strategy
- Help prepare for and experience financial stability in the face of frequent job changes and M&A activity
- Invest and manage unexpected cash or windfalls in alignment with your stated goals and objectives
- Review and navigate a severance package should you be unexpectedly laid off
- Simplify and organize your financial life with a cohesive financial and investment strategy
- Advise and include workplace retirement plans into the entire investment strategy
- Manage and align your entire wealth to meet the financial goals and objectives for you and your family
- Review and manage areas of potential risks
- Create saving strategies to make the best use of cash flows and income
- Perform financial modeling and goal-achievement projections
- Review and advise on estate and wealth transfer plans
- Ongoing investment management from a fiduciary and fee-only financial advisor