



Tax Services for Executives & Professionals

Stock-Based Compensation

Many executives working for large public or private companies often receive compensation based on the underlying equity performance of their company. Stock-based compensation can take many forms including stock options, restricted stock, and performance stock units. In addition, executives are often eligible to participate in deferred compensation plans, supplemental retirement plans and other special compensation benefits. Decisions on how and when to execute these incentives are not always clear.

We Provide Decision Path Analysis

Timing is often critical as it relates to equity and compensation plans. Hancock Askew has the expertise and experience to help executives navigate the tax and financial decisions related to stock-based compensation and defined compensation plans. We coordinate with your investment advisors to help plan a proactive strategy to minimize taxes and maximize cash flow. Most compensation benefits have significant tax ramifications that often can be managed through proper planning to produce tax savings. Examples of factors that impact the outcome include taking advantage of capital gain tax rates when available, avoiding alternative minimum tax or deferring taxation.

Comprehensive Tax Support

Our tax professionals will proactively plan for the future, leverage current tax incentives, defer income if possible and ensure all tax filings are accurately completed.

The Next Step

Explore your options. Visit our website to learn more about how we can work together for your success.

www.HancockAskew.com

Our Service Scope Includes:

- Stock Option Planning for Incentive (ISOs) & Nonqualified Stock Options (NQSOs)
- Analysis & Advice Surrounding IRC Sec 83(b) Elections
- Analysis of Restricted Stock Awards & Restricted Stock Units, Stock Appreciation Rights, Performance Stock Units, and Deferred Compensation Participation for Equity Awards
- Planning for Retirement
- Income Tax Planning & Compliance
- Estate, Gift & Trust Tax Services

Create a Tax Plan

Executives are busy professionals who often haven't developed a comprehensive tax planning strategy. In its simplest form a tax plan is a method of controlling the outcome of potential taxable situations. A key factor to an effective tax plan is clear and proactive communication. Let us help you develop a tax plan unique to your needs.



HANCOCK ASKEW & CO LLP
ACCOUNTANTS & ADVISORS