QUALIFIED SMALL BUSINESS STOCK (SECTION 1202)
Shareholders should review whether the current or future disposition of founder’s shares qualifies for up to a $10 Million gain exclusion for Federal and State tax purposes.

MERGERS, ACQUISITIONS AND SECONDARY SALES
The fast-paced market makes it crucial to analyze business dealings to find the best solution for your company and yourself as quickly as possible. We provide insight into the compliance and tax aspects of mergers and acquisitions for a smooth transition. And for secondary sales, we offer expertise when analyzing due diligence and tax consequences.

STOCK OPTIONS
When it comes to understanding stock options, the list can feel endless – restricted stocks, incentive stock options, nonqualified stock options. Our experts can help from the planning stage to income-tax forecasting.

PRIVATE BUSINESS ANALYSIS AND ADVISORY
When high-net-worth individuals are connected to a business, either as an owner or an executive, those businesses are a material consideration in the proper management of family affairs and should be integrated into the comprehensive plan. Every business stage is different, but one thing is always constant: the need for a true partner and trusted advisor to help you along the way.

INSURANCE ADVISORY
Globalization, technology, natural disasters, lawsuits and unexpected life events are but a few of the conditions which can derail even the best-planned scenarios. Risk cannot be eliminated, however, Withum Insurance Advisors can help mitigate that risk by identifying, assessing and, when appropriate, insuring exposure.
WEALTH MANAGEMENT
Investing is crucial to the growth of your future. Specializing in personalized wealth management, including tax-sensitive and socially conscious strategies, Withum works with you to establish and accomplish investment goals at any financial level.

CYBERSECURITY AND IDENTITY PROTECTION
With the number and variations of successful cyber breaches and attacks increasing every day, high-net-worth individuals and their families are most at risk due to their profile, wealth and activity levels. Penetration testing and advanced planning is essential.

ESTATES, TRUSTS AND CHARITABLE PLANNING
High-net-worth individuals have the opportunity to protect their assets and properly plan out their net worth. Withum’s estate and trust professionals ensure that the planning and administration of your estate, trust and charitable contributions are done with the utmost care. We can’t see the future, but we can help you plan for it by providing options that support your vision and your goals.

FAMILY OFFICE SERVICES
With services such as bill payment, bookkeeping services, domestic payroll services in order to organize, Withum makes it easy to control your cashflow and prepare periodic financial statements.

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