Solving for Predictability

Following a major liquidity event, a high-level executive wanted to convert concentrated cash into predictable, flexible future income—without overexposure to market risk or unnecessary complexity.

Haggar Wealth Group

After the exit, there were a lot of moving pieces—taxes, income, and the long-term plans for this family. They wanted something organized. Our team helped them bring everything together into one coordinated strategy that finally made the entire picture feel manageable.

The Challenge

A liquidity event can be life-changing, but it also introduces decision pressure and an overwhelming number of paths forward.

Our job: transform complexity into a structured plan to move forward with complete clarity.

Navigate elevated tax sensitivity, investment timing risk, and the need to balance income reliability with growth and long-term planning.

Our Approach

Through deep discovery we built a personalized, planning-based strategy to address multiple post exit priorities:

- predictable income
- tax efficiency
- long term growth
- estate plan alignment

The plan integrates each aspect of our client's life while leaving room for adaptability amid future liquidity events and life transitions.

The Outcome

1. The client moved from liquidity event uncertainty to a strategy supportive of post-exit tax inefficiencies and designed for future flexibility.

2. The concentrated post-sale exposure was repositioned into a diversified portfolio aligned with goals.

3. Our coordination with the client's legal and tax professionals helped to ensure that the investment solution aligned with legacy and wealth transfer planning goals.

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