



## Executives

Timing is either an opportunity or a problem.  
Let's work together to find the opportunities for you.

*Some initial advice  
concerning your  
financial plan:*

Delegate  
your way  
to the top.

You wouldn't be where you are today without talent, insight, goals, and the will to achieve. Because of your leadership position in a large company, no doubt you are knowledgeable about financial matters and you understand the unique complexities of how you are compensated.

Incentive-based equity compensation plans were created to be competitive, but not all that user-friendly — especially when it comes to having a big-picture understanding of the financial planning implications. Making smart moves at the right time means knowing exactly which levers to pull and which ones to leave in place. Missed windows of opportunity can be costly to you and your family.

It takes a serious investment of time and attention to stay on top of all the rules and regulations. Between the demands of work, family, and your other responsibilities, spare time is the one thing that you have in short supply. Because your Bridgeworth advisor works with other executives and is immersed in the details of incentive-based equity compensation on a routine basis, he or she can be a valuable resource to you.

### **ORGANIZING YOUR FINANCIAL LIFE**

Over the years, it's not unusual for executives to end up with multiple deposit accounts, investment accounts, insurance policies, and important documents that they are not even aware exist. If that sounds familiar to you, get ready to finally know where everything is.

### **ONE-SIZE-FITS-NONE™ FINANCIAL PLANNING**

It all begins with a blank sheet of paper and a conversation. This initial discussion between you and your Bridgeworth advisor will be one that continues over many years. It's a conversation about your goals, values, and the people and things that are most important to you.

The sum total of this ongoing conversation will yield a holistic and highly personalized financial plan which is analyzed and vetted before any final

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recommendations are made. The resulting plan is then presented to you in a manner that is as straightforward and jargon-free as possible.

### **TIMING + INSIGHTS**

Our insights will enhance your ability to make both time-sensitive and longer-term financial decisions by thoroughly researching your options. We have the time, tools, and resources to provide you with actionable information, insights, and recommendations to keep you on the path toward the financial future you have envisioned.

This is a team sport. In order to provide you with the best available insights, your advisor is constantly drawing on Bridgeworth's extensive wealth of knowledge and financial planning resources.

We serve as a sounding board and advisor to bright people like you. Call us and let's begin a conversation.

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