withum

FOUNDERS AND TECH EXECUTIVE SERVICES

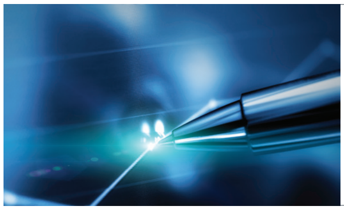
Top Areas of Focus

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.

withum

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.

RESIDENCY PLANNING

As a tech founder or executive, tax residency can be a major issue, especially if you are planning for a liquidity event. At Withum, we specialize in tax residency planning, offering tailored strategies to help individuals and businesses optimize their tax obligations. With a team of experienced professionals, we provide comprehensive advice on navigating complex tax laws and ensuring compliance while maximizing financial benefits.

CRYPTOCURRENCY

At Withum, we have a deep level of expertise relating to all of the issues that arise within today's ever-changing digital asset environment. Whether you are a VC with a crypto strategy or an investor trying to navigate the tax implications of your digital currency assets, our team of experts can help. Withum's Digital Currency and Blockchain Technology Services Team has the in-depth industry experience to provide specialized services tailored to your needs.

Daniel Krolikowski, CPA
Partner, Founders and Tech Executives
T (973) 532 8869
dkrolikowski@withum.com

Tony Panico, CPA, MS
Partner, Founders and Tech Executives
T (973) 793 1314
tpanico@withum.com

DISCOVER WHAT OUR FOUNDERS AND TECH EXECUTIVES SERVICES CAN DO FOR YOU.
Click or visit withum.com to learn more.