SEAMLESSLY CONSOLIDATE YOUR COMPANY STOCK WITH PUREfi WEALTH

CONSISTENT CUSTODIAN ACCESS

You can simply and efficiently authorize your existing custodial account (Schwab, Fidelity, eg) that holds your company stock to come under the purview of your financial advisor at PUREfi Wealth without any transfer of assets or accounts. This process ensures that the position remains in your existing account while incorporating into your advisory relationship and comprehensive wealth plan.

ELECTRONIC SIGNATURES

Electronic signatures streamline and expedite the process, allowing for faster and more efficient authorization and execution.

EFFORTLESSLY INTEGRATE

Incorporating your company stock into your overall portfolio allows for a unified view of your investments leveraging our robust, state-of-the-art tools for performance reporting, aggregation, analytics, planning, and collaboration, all while keeping your current custodial arrangements intact.

ALIGN OWNERSHIP

Structure your ownership entities to match your estate plan, philanthropic goals, or gifting strategy. This helps to ensure efficient wealth transfer, optimize tax benefits, and support your legacy and charitable objectives.

COLLABORATE WITH YOUR ADVISOR

Work closely with your advisor to strategically manage the tax implications, risk factors, and liquidity needs associated with your concentrated company stock position. This partnership facilitates a well-rounded approach to optimizing your financial strategy and protecting your assets.

WHY IT MATTERS

Very often company stock represents a substantial portion of your overall net worth, yet is overlooked in the advisory relationship and financial plan that informs the achievement of your long-term goals. We believe it is critical that your company stock is incorporated into all decisions.

ABOUT PUREfi WEALTH

PUREfi Wealth is a boutique independent wealth advisory firm offering comprehensive multi-generational wealth planning, investment management, and advisory services. We are **PURE** in our relentless focus on creating positive outcomes for clients; we are committed to a **FIDUCIARY** standard of care that ensures our clients' interests come first; we are **INDEPENDENT** as a partner-owned firm beholden to no one but our clients.

CLICK HERE TO CONTACT US

PUREfi WEALTH

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