



GOAL: PRESERVE THE WEALTH & LEGACY YOU'VE BUILT

THE EXIT DILEMMA

Complexity beyond the P&L

Business owners often face **The Exit Dilemma**, where a lifetime of work is at risk due to tax erosion and a lack of liquidity.

Many struggle to calculate their “wealth gap” — the exact number needed net-of-taxes to fund their next chapter.

OUR STRATEGY

Acting as your personal CFO

Stratos Private Wealth acts as the strategic guide for your deal team, coordinating with CPAs and M&A attorneys with the goal to maximize enterprise value.

By planning at least 24 months in advance, we implement proactive tax-loss harvesting and estate structures that serve as a strategic off-ramp, seeking to protect your capital, mitigating tax hits, and working toward a smooth transition into your next act.

✉ stratosprivatewealth.com

☎ (844) 249-6534

From enterprise value to lasting freedom

We've helped business owners save thousands in capital gains taxes by strategically gifting company units to a donor-advised fund prior to sale.

Others have been able to retire sooner by strategically leveraging 401(k) contributions and cash-balance plans.

YOUR INVESTMENT COMMITTEE:

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