BZ WEALTH ADVISORS

Executive Liquidity Readiness Program

Less Noise. Better Alignment. Cleaner Closes.

A transaction-aligned planning and wealth management solution for non-owner executives navigating a company sale. We handle the personal financial decisions so your leadership team can stay focused on the deal.

We help executives make the financial decisions that often create noise inside otherwise smooth deals.

HOW THE PROGRAM WORKS

Three phases, aligned to your deal timeline

Personal financial questions come up before, during, and after a transaction. When they go unaddressed, they create distractions. This program maps to each phase of the deal.

Phase 1

Pre-Deal

Liquidity Planning

We help executives understand what their equity, options, and benefits are worth and what decisions to make before the deal is announced.

Phase 2

At Close

Proceeds Allocation

When the wire hits, executives face tax strategy, estate planning, reinvestment, and cash decisions. We've already planned for it.

Phase 3

Post-Close

Investment Strategy

With liquidity in hand, we build a long-term wealth plan including private market investments most executives can't access on their own.

WHY IT MATTERS

Better outcomes for deals and for people

Reduces distraction

Executives stop worrying about personal financial decisions during the most critical transaction of their career.

Improves decision clarity

When people know their finances are handled, they make cleaner, faster decisions around the deal itself.

Keeps deals moving

Management-related noise is a common cause of deal friction. This program removes it before it starts.

WHO THIS IS FOR

Built for executives in sell-side transactions

- ✓ **C-suite and VP-level executives** at a company exploring or actively engaged in a sale process
- ✓ **Senior managers with equity or options** who need to understand what their payout looks like after taxes
- ✓ **Key employees receiving a liquidity event** who have never had a financial plan for that kind of money
- ✓ **PE firms, bankers, and M&A attorneys** who want a trusted partner for the personal financial side of deals

A simple way to improve deal quality — without adding complexity.

Schedule a confidential conversation · wade@bz-wealth.com · (208) 508-4070 · bz-wealth.com/liquidityreadiness

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