

Beyond the Exit: How to Plan Ahead and Proceed with Confidence

McCarter & English Entrepreneurs Series

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Whether you are 25, 35, or 50, you may not yet know how many dependents you will ultimately have, what your lifestyle will be, or how your career will develop. Such uncertainty can make planning more difficult for you than for someone near retirement age, whose personal and family needs are more well-defined. And if you've suddenly acquired wealth by selling your business—or are about to do so—you may have to reevaluate all your existing financial plans. Significant holdings of company stock and options add a whole other layer of complexity by offering great upside potential along with concentrated risk.

In this session, we will cover:

A case study that shows how one entrepreneurial couple determined how much they could spend on such things as buying a bigger home, seeding their next venture, funding their children's college education, and saving for retirement as well as gifts for family and charity

Sophisticated but clear explanations of how to quantify your retirement saving and life insurance needs, make the most of a 401(k), deal with large positions in a single stock or stock option, and take advantage of tax-efficient wealth transfer techniques and charitable-giving strategies

Basic explanations of investing, estate-planning, tax, and debt-management issues

A checklist for the suddenly wealthy, as well as checklists that can help you navigate key financial issues with regard to marriage and having a first child

Speaker: Anne K. Bucciarelli is a Director in the Wealth Planning and Analysis Group and is responsible for wealth management research. She provides customized advice on complex financial issues for private clients and their advisors on wealth transfer strategies and asset allocation decisions including concentrated stock exposure and planning for corporate executives. Bucciarelli is also responsible for providing investment advice and solutions to nonprofits and philanthropic individuals as well as next-generation wealth owners. She has been the author of and a contributor to the firm's published research on several topics. Bucciarelli joined Bernstein in 2004, became an analyst in the Wealth Planning and Analysis Group in 2006 and assumed her current position in 2014. She earned her BA in finance and information systems from Loyola University of Chicago, magna cum laude and with honors. A Chartered Financial Analyst (CFA) charterholder since 2011, she is also a member of the New York Society of Security Analysts (NYSSA) and is a founding member of the American Brain Foundation Ambassador Program.