MFA
Morling Financial Advisors

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The Cerebras Equity Blueprint

A focused planning engagement for navigating the post-IPO phase. Built around tax, liquidity, and investment strategy so you can make the most of your equity with confidence.

$1,750
ONE - TIME ENGAGEMENT

WHAT'S INCLUDED

1 Tax Strategy

- Create exercise strategy for unexercised options
- Analyze tax liability
- Safe Harbor requirements
- Identify tax deferral opportunities
- Coordinate with your tax team

2 Liquidity Strategy

- Plan for liquidity and cash flow needs
- Develop a personalized divestment strategy
- Manage concentrated stock risk
- Evaluate tax-deferral vehicles

3 Investment Strategy

- Assess risk tolerance
- Analyze current investment holdings
- Develop an investment allocation strategy
- Implement tax-efficient investment solutions

Additional Planning Options

Available Upon Request

- Financial independence & early retirement
- Legacy estate planning & gifting
- Philanthropic planning
- Asset preservation & protection strategies

HOW IT WORKS

1. **Complimentary Intro**
   A 30-minute conversation to align on your goals.
2. **3-4 Week Engagement**
   We build your personalized blueprint.
3. **Written Action Plan**
   A clear plan that's yours to keep.

Morling Financial Advisors (MFA) does not provide tax or legal advice. Please consult your appropriate tax and legal advisor before acting on any recommendations. This material is for informational purposes only.

Ready to start? Schedule your intro call today.

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