



Transforming Financial Futures for a High-Level Executive



Candace, an HR leader at a Fortune 100 company, moved from the East to the West coast for a company acquisition. Single at the time, she came to us with the primary goals of setting herself up for retirement and freezing her eggs. Her financial situation included a savings account, stock options, RSUs, and a 401k, but she faced significant challenges: no savings outside of her employer, an excessive cash balance, no disability insurance, and no concise plans for retirement. Additionally, she was uncertain about how to save for a property purchase.

She sought WWG's services to address these issues and create a comprehensive financial strategy. We engaged in 3D-level financial planning, focusing on her immediate and long-term goals. For her home purchase, WWG defined initial and monthly savings amounts and selected appropriate account types. For her egg-freezing goal, she allocated bonus money to cash reserves. We also established monthly and annual amounts for her retirement savings and advised on suitable account types. Her annual bonus was allocated strategically, and WWG analyzed her stock options' vesting schedule, collaborated with her accountant, and planned for liquidation and reinvestment. Lastly, we provided pension analysis and projections and evaluated job change opportunities and their financial impacts.

The results were transformative. She successfully preserved her eggs and recently welcomed a baby. She got married and used her flexible savings and stock options to fund the wedding. She was approved for a loan and made a large down payment to build her and her husband's lake home. With newfound confidence, she changed jobs and secured a higher salary with an organization she supports wholeheartedly. Despite the loss of her future pension from her previous employer, she felt secure due to her personal retirement savings, a generous retirement plan with her new employer, and joint income with her spouse.

Throughout the process, WWG ensured that her core values of happiness, health, family, meaningful work, and diversity were integral to her financial planning. By aligning her financial strategies with these values, we provided a holistic and fulfilling approach to her financial well-being. Our values-driven approach enabled Candace to achieve her personal and financial goals, demonstrating the power of customized financial planning.

Client's name has been changed to protect their privacy.

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Whitney Emanuel

Whitney Wealth Group
Founder, CEO | Financial Planner | CFP® | CRPC®
phone 612-296-6939
whitney@whitneywealthgroup.com
www.whitneywealthgroup.com