

Equity Compensation

Whether you're a senior director or just starting your career, equity compensation can significantly impact your overall financial plan. Our team evaluates your compensation package and designs integrated tax and liquidity strategies that align with your long-term goals.



Portfolio Concentration

- ISOs & NSOs
- Stock Awards & RSUs
- ESPPs
- NUA



Tax & Timing Strategies

- Exercise Strategies
- Vesting Optimization
- Charitable Giving
- Estimate Tax Liability



Asset Diversification

- Risk Assessment
- Portfolio Rebalancing
- Reallocation
- Reduce Volatility



Merrimack Wealth Management, LLC is a member firm of The Fiduciary Alliance, LLC, which is a Securities and Exchange Commission registered investment adviser.