William Blair

Private Wealth Management

Corporate & Executive Services

Our Services

We offer a comprehensive suite of services to corporate and institutional investors. William Blair works with entrepreneurs and executives to make informed decisions about their equity compensation, employer stock holdings, risk management strategies, and unique liquidity needs.

Private Wealth Management

Customized, integrated solutions for each investor and an unwavering commitment to our clients' success

- Actively Managed Equity Strategies
- Financial Planning
- Tax-Efficient Investing
- Strategic Asset Allocation
- Syndicate Participation
- Alternative Investments

Monetization Strategies

Creating liquidity from owned equity

- Sales of Control and Restricted Stock
- Rule 10b5-1 Trading Plans
- Stock Option Exercise Financing
- Block Trades and Open Market Sales

Diversification Strategies

Bespoke hedging and risk management solutions

- Options Overlay Strategies
- Zero Premium Collars
- Exchange Funds

Corporate Executive Education

Working closely with clients to understand their company benefits

- Equity and Option Analysis
- Deferred Compensation Review
- Assist in the review of Employment and Retirement Agreements

Philanthropic Strategies

Helping our clients develop strategic philanthropic strategies to execute their vision and optimize investments in the community

- Charitable Lead and Remainder Trusts
- Donor-Advised Funds
- Private Family Foundations

Our Services (continued)

Cash Flow Planning

We help implement customized fixed-income portfolios as well as institutional money market funds that offer same-day settlement capabilities

Corporate Share Repurchase

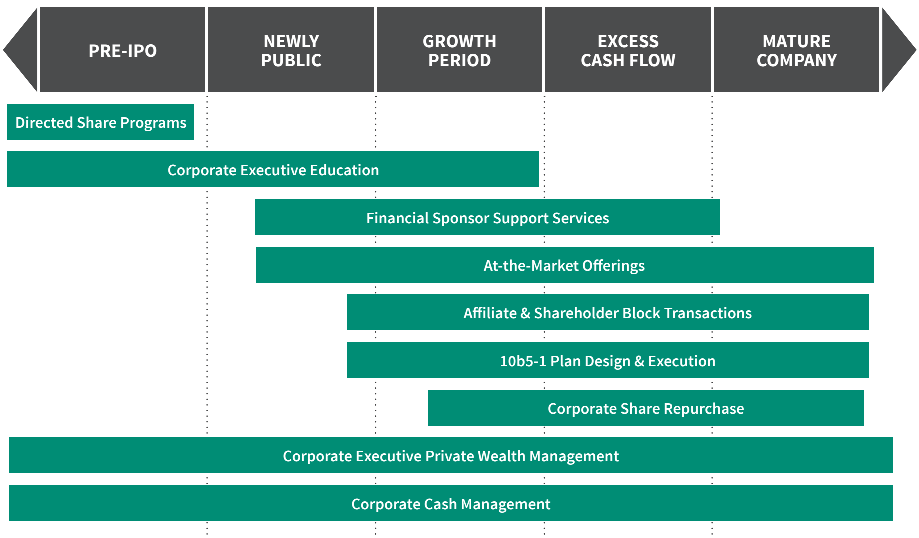
Coordination of purchase and cancellation of treasury shares (company-owned shares)

Fully Paid Lending

Clients can loan certain securities and gain the opportunity to earn incremental income on their portfolio through the securities-lending market

Securities-Based Lending

Using eligible assets as collateral, clients may be able to borrow at competitive and flexible terms against securities held in their account(s) at William Blair.



Trusted guidance for business owners and corporate executives

Guiding business owners and corporate executives through the challenges and opportunities in managing both their personal wealth and their companies' finances.

For more information, please contact your William Blair wealth advisor or:

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August 2024