

The Sand Hill Blog

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Sara Craven, CFP®

July 2019

Phew! IRS Announces No Clawback of the Lifetime Gift Tax Exemption



JUN 5, 2019

Sand Hill Wins Two American Advertising Awards for Elements of Advertising and Website Redesign



Sand Hill News

MAY 23, 2019

CNBC Halftime Report Discussion on Apple's Impact on the Big Market Picture | May 22, 2019



Sand Hill News

APR 24, 2019

It's Time to Get REAL, California

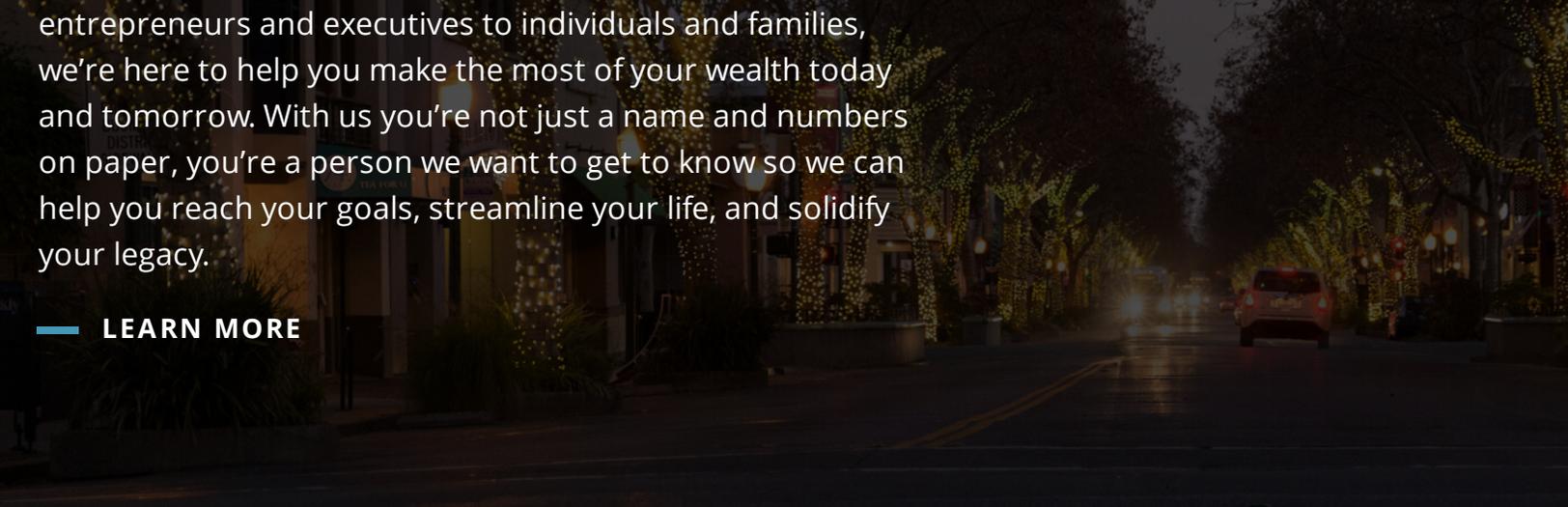


Kimberleigh Williams, CFP®



Our Expertise

We've been here since Silicon Valley was a startup itself. That's why when you work with Sand Hill, you have a partner that understands the unique challenges you face. From



entrepreneurs and executives to individuals and families, we're here to help you make the most of your wealth today and tomorrow. With us you're not just a name and numbers on paper, you're a person we want to get to know so we can help you reach your goals, streamline your life, and solidify your legacy.

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Individuals & Families

Specialized Planning Needs

Entrepreneurs

We understand there are unique challenges of managing wealth generated in Silicon Valley—from private equity and concentrated stock to liquidity events and succession planning.

Executives

“Valley Wealth” has grown increasingly complicated. At Sand Hill, we have long-standing experience with RSUs, deferred compensation, and specialized tax and risk management.

Multi-Generational Wealth

Helping plan for schooling, estate wealth transfer, fiscal responsibility education and starting businesses are some of our focus areas. When it comes to the future, we understand the needs of families and the importance of preserving legacies.

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Endowments & Foundations

Silicon Valley is a leader in giving back. We have the depth and experience to steward your organization’s valuable long-term resources so you can make the greatest possible impact on the people and communities you serve.

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