



SCROLL

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# Financial Planner

## FEATURED POST

### Stock Option Valuation and Your Exercise Strategy

One of the most difficult questions you can face with stock compensation is when to exercise your non-qualified stock options (NQSOs). If the stock price goes up afterwards, you think you made a mistake by exercising too soon. If it goes down, your timing confirms the genius in you.

**Read More** →

Sam Swisher, JD, CPA,  
CFP®

Other Blog Posts-



## Savings Account

A Health Savings Account, more commonly referred to as an "HSA", is an account that can help pay for medical expenses now and in the future. An HSA is very unique in that it is the only investment in the tax code that is 'triple tax-exempt', meaning they have 3 tax advantages! [Read More →](#)

## South Carolina Tax Credits

Are you a South Carolina taxpayer who would like to reduce your state income tax? If so, you may want to consider purchasing South Carolina tax credits. [Read More →](#)

## Underutilized Financial Tool

Many people are aware of the significant benefits of Roth IRA's compared to traditional IRA's, but there are several ways to take advantage of them that are often overlooked. [Read More →](#)

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