SCHMIDT FINANCIAL GROUP

Your wealth is complex. Your plan should be clear.

Comprehensive financial planning for executives and technology professionals with equity compensation

Get Started

The Schmidt Advantages

MAKE DECISIONS CONFIDENTLY

Since 1993, our firm principals have navigated IPOs, private stock sales and other liquidity events. We understand that having wealth tied to your employer is complex and are here to support you.

GET THE CLARITY YOU NEED

Tax advice can conflict with risk mitigation, investment plans need goals, and complex decisions need to be modeled, not just talked about. We provide our clients with a clear and comprehensive plan of action.

UTILIZE THE RIGHT TOOLS

We believe our clients benefit immensely from specialization. And that's because everything from our custom reports to our diversification models are all built with their unique needs in mind.

Learn More

AS FEATURED IN

Is complexity holding you back?

Do you know how much equity you should sell and when?

Is it time to connect your equity grants with goals?

Does thinking about how much is at stake give you anxiety?

Are you unsure how to prepare for an IPO or tender offer?

Get Started

How Do I Get Started?

You no doubt have a lot of questions that go beyond simply choosing investments. Would a house purchase in two years affect your investment allocation today? Would working at a startup for five years impact your timing for retirement? We'll work with you to help define and test scenarios, so you have a plan and a portfolio that are always in alignment.

1.

We meet with you to get to know you and and your goals

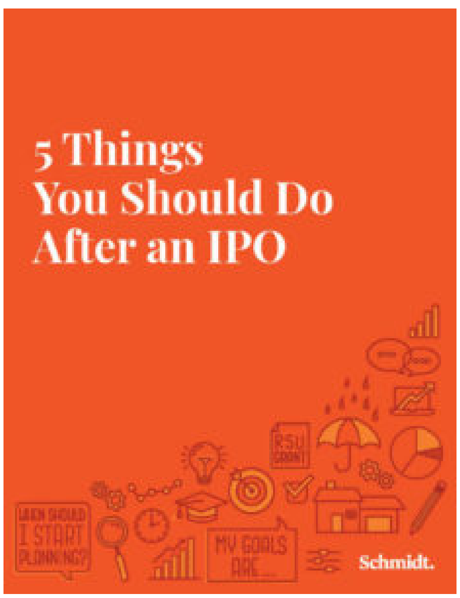
2.

We make a plan using the Agile Planning Framework

3.

We invest and track progress with you

Learn More



READ OUR WHITEPAPER

5 Things You Should Do After An IPO

If you're an employee of a company that goes public, IPO's can be both exciting and confusing. Here's a guide to help you steer clear of common pitfalls and start moving toward meaningful financial goals.

Download PDF

What's It Going To Cost?

We understand that financial advice can't be dictated by vesting or IPO timelines. That's why we offer two fee structures so you can have access to the resources you need regardless of your liquidity.

FIXED FEE

If your company is still private and/or your investable assets are below $1 million we are typically compensated using a fixed annual planning fee.

ADVISORY FEE

If your investable assets are liquid and exceed $1 million we charge an advisory fee that is calculated by multiplying your assets managed and your respective fee tier(s).

Ready To Get Started?

First Name *

Last Name *

Company *

Email *

How can we help?

SUBMIT