TOP 5

ARKOS GLOBAL ADVISORS

FINANCIAL DECISIONS



AUTOMATING
WEALTH BUILDING &
CASH FLOW

- Set up automated savings & investments (e.g., direct transfers to brokerage accounts, retirement plans, and DAFs).
- Use cash flow automation tools to allocate income efficiently (e.g., profit-first budgeting or percentage-based allocations).



OPTIMIZING EQUITY
COMPENSATION &
TAXES

• Develop a tax-efficient strategy for RSUs, stock options, and ESPPs to avoid unnecessary tax burdens.



• Plan for strategic tax-loss harvesting and chartiable giving to reduce taxable income.

3

STRUCTURING
INVESTMENTS FOR
SIMPLICITY &
GROWTH

• Consolidate accounts to reduce financial clutter (fewer logins, better tracking).

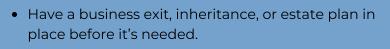




4

PROACTIVELY
PLANNING FOR
LIQUIDITY & MAJOR
TRANSITIONS

• Keep a liquidity buffer for opportunities or economic shifts (6-12 months of living expenses).





5

LEVERAGING
EXPERTS TO FREE UP
TIME & MAXIMIZE
EFFICIENCY

- Partner with a financial advisor, tax strategist, and estate planner to focus on big-picture wealth building instead of day-to-day decisions.
- Delegate low-value financial tasks (e.g., bill pay, bookkeeping) to stay focused on high-impact opportunities.

