

Guide For Selling Company Stock

This is an extra resource to go along with the original article:
Should You Sell Your Company Stock?

Use this checklist to help you cover all of your bases when selling company stock.



Calculate your ideal asset allocation by working with a financial advisor.

Current Value: _____

Target Value: _____

Value to Sell _____ ÷ Current Price _____ = Shares to Sell



Determine the tax implications of selling company stock with a tax advisor.

- Calculate tax liability from stock sale
- How will additional income impact the rest of your tax return?

RISK! You could potentially have a large tax liability after the sale, however; that also likely means your portfolio is weighted too heavily in company stock.



Develop a plan to reach and stay at your target allocation

- How much company stock are you willing to sell immediately?
- Will you receive additional shares in the future?
- If you can't reach your target allocation right away, develop a plan for selling the remaining portion over time and commit to it.
- Stock sales in different calendar years could reduce the tax liability
- Planned, systematic sales over months or years could reduce regret of missed future gains (*Keep in mind, the stock could also drop!*)



Place orders to sell company stock and buy other assets.

- Set aside enough proceeds from the stock sale to cover future tax liability
- Set up a reminder to sell company stock based on your predefined schedule.