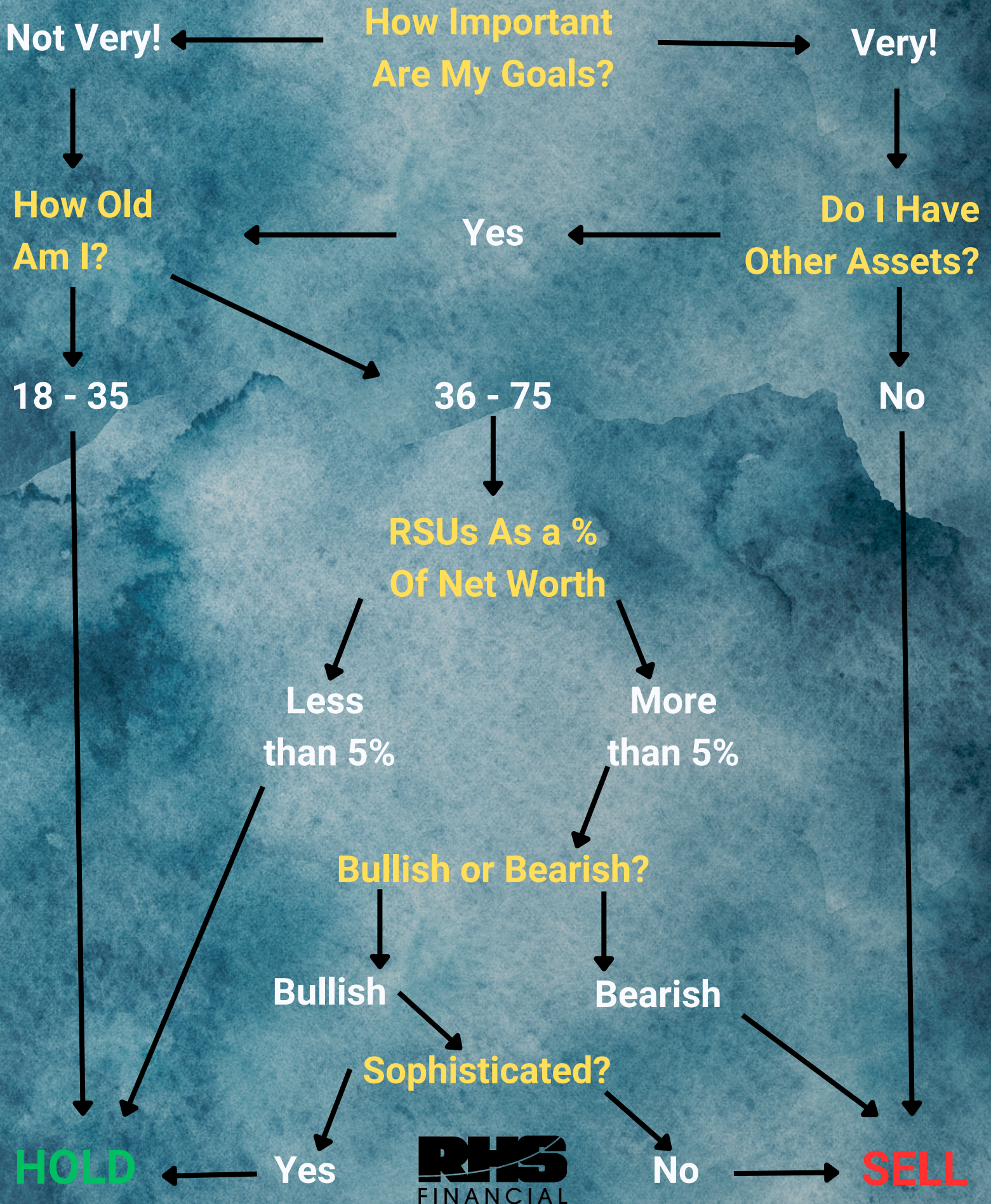


# RSUs: Hold or Sell





# RSUs: Hold or Sell

- **How Important Are My Goals?** : Are they must have goals or nice to have goal? Are you ok if they don't get accomplished or will that destroy the future you have envisioned for yourself?
- **Do I Have Other Assets?**: Do you have other investments, cash, or income that you can accomplish those super important goals with? Or, is your equity compensation an important component of making your dreams happen?
- **How Old Am I?**: Do you have your entire career and earning years in front of you? Are you going to pass away with a large estate? Or are you starting to think of retirement, kids college education, and moving on to the next stage of your life as you get your finances organized
- **RSU As a % Of Net Worth?**: Is your accumulated company equity a small part of a more diversified portfolio or is it a vast majority of it? Is the failure or success of this investment going to dictate the outcome of your finances?
- **Bullish or Bearish?**: Do you think there is a strong future ahead for the company? In the next year, five, or ten? Do you think the company is destined to fail?
- **Sophisticated?**: Are you a sophisticated investor? Do you understand the risk of investing in one company? Are you familiar with market cycles? Do you have hedging strategies you can implement?