

[PDF] Consider Your Options: Get The Most From Your Equity Compensation

Kaye A. Thomas - pdf download free book



Books Details:

Title: Consider Your Options: Get th

Author: Kaye A. Thomas

Released: 2000-01-14

Language:

Pages: 248

ISBN: 0967498163

ISBN13: 978-0967498164

ASIN: 0967498163

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Description:

Just about everyone has heard a story about a corporate secretary or twentysomething Microsoft employee who retired early--as a millionaire--not because of winning the lottery, but because she exercised the stock options granted by her company. The fact is, many, many working Americans have access to stock and option plans in the workplace, and although it is a bit of a stretch to assume that such plans are a guaranteed ticket to riches, equity compensation can be an intelligent

means for building wealth. The trick, according to Kaye A. Thomas, is understanding and handling it properly, and this is where *Consider Your Options* comes in.

Thomas, a veteran tax lawyer, has written a straightforward, no-nonsense, plain-language guide to getting the maximum value from your equity compensation. He begins with the basics--what stock is and how to buy and sell it, stock grants and purchases, options in general--and proceeds with clear examinations of nonqualified and incentive stock options. From there, he leads the reader through the ins and outs of exercising stock options, vesting, and employee stock-purchase plans, with an emphasis on tax implications and financial planning (an entire section of the book, for example, deals with the Alternative Minimum Tax).

"There are certain things about stock, options, and taxes that are almost never explained because *every idiot* knows them," Thomas writes. "Unfortunately, there are many normal, intelligent, educated adults who don't know these things--because hardly anyone ever bothers to explain them." Now that Thomas has bothered, novices and experts alike can avoid the common mistakes and poor planning that jeopardize the highest return from these benefits. --*Svenja Soldovieri*

Review A very good overview of the tax and financial planning implications of stock options, written in a way that's useful to experts and understandable to those who are not. -- *Corey Rosen, Executive Director, National Center for Employee Ownership*

An excellent, thorough, and easy-to-read resource for anyone who has received stock compensation. -- *Laura Fay, Vice President, E*TRADE Business Solutions Group*

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