

# Key Questions to Get Clear on Before, During, and After Transaction Day

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Sequoia has worked with clients through significant liquidity events for decades. In our experience, the partners who navigate this with the most confidence are the ones who come in with the right questions — and the right advisors.

The following are questions every Eide Bailly partner should be able to get clear answers to this year. If you're already working with Sequoia, many of these are conversations we've already started. If you haven't engaged with us yet, consider this your starting point.

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## Where do I send the money on Transaction Day?

This is the most asked question in any transaction. It is also the most time-sensitive. Before your close date, you should know exactly where your proceeds will be wired and why.

## What taxes will I owe, and when?

A liquidity event typically creates one of the most complex tax years of your life. Surprises here are costly.

## How should I invest this money?

Getting proceeds into the right structure, in the right accounts, for the right time horizons is not a decision to make under pressure.

## What does my cash flow look like going forward?

For many partners, a transaction comes alongside a change in ongoing compensation. Understanding what your income picture looks like post-close is as important as understanding the transaction itself.

## What does my overall wealth plan look like from here?

A liquidity event is one of the most significant financial inflection points of your career. It is also an opportunity to step back and make sure your entire financial picture is organized around where you actually want to go.

## Who is on my team, and are they the right fit for this moment?

Not every advisor has experience navigating the complexity of a significant liquidity event. This is the moment to make sure yours does.