

MARK & JENNA

Ready to Leave Corporate America



Mark, 52, enjoys his job in medical sales. However, Jenna, 49, is nearing burnout after spending 5 years working at a fast-paced, fast-growing tech firm. While she is grateful for the generous salary (including stock options), she loves flower arranging, and she dreams of leaving corporate America to start a mobile flower cart.

Mark and Jenna love to travel – and they would like to do some of their bucket list travel while they are young and healthy – but they aren't sure if they can afford to if Jenna gives up her corporate salary to start her mobile flower cart. In addition, Mark joined a not-for-profit board 2 years ago and he and Jenna made a significant 5-year pledge based on their salaries at the time.

They have questions about Jenna's ability to pursue her passions while still having enough to live the life they want and honor their financial commitments.

How Sanctuary Can Help

- *Work with Mark and Jenna to develop a Statement of Financial Purpose. This will serve as the anchor for their plan and help them prioritize all their goals.*
- *Build a retirement income plan focusing on dynamic spending and tax smart distribution strategies. More than a probability of success, Mark and Jenna need confidence that Jenna can leave an unfulfilling job with a meaningful salary and that it won't knock them off track from the things they want to do.*
- *Evaluate Jenna's stock options and develop a strategy for diversification once she leaves her job.*
- *Help Jenna set up a solo 401(k) once she becomes a business owner.*
- *Identify opportunities to gift highly appreciated securities to fulfill Mark and Jenna's pledge given their reduced cash flow.*
- *Identify opportunities to do Roth conversions in lower income years before retirement.*

A Sanctuary financial plan will provide Mark and Jenna with the framework they are looking for to navigate all their financial decisions – today and down the road.

Worry less. Live more.



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This case study is a hypothetical situation to demonstrate how our services may help prospective clients. Case studies are not based on actual client experiences. Because each client's needs are different, solutions and results will vary.

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