

[Date]

[Recipient Name]

[Recipient Title]

[Company Name]

Subject: Maximizing Your Long-Term Equity Value

Dear [Recipient Name],

As you continue to grow with [Company Name], we want to ensure you have a clear roadmap for maximizing the value of your equity compensation. Equity is a significant component of your total rewards, designed to align your success with the long-term growth of the company.

To help you get the most out of your holdings, we suggest focusing on the following key areas:

- **Vesting Milestones:** Track your vesting schedule closely to understand when shares transition from unvested to fully owned assets.
- **Tax Optimization:** Consult with a financial advisor to understand the tax implications of your specific equity type (e.g., ISOs, NSOs, or RSUs) to avoid unnecessary liabilities.
- **Growth Reinvestment:** Consider how your equity fits into your broader portfolio and evaluate the long-term potential of holding versus diversifying as milestones are met.
- **Performance Alignment:** Understand how company performance metrics directly impact the valuation of your grants.

We are committed to providing you with the resources needed to manage your equity effectively. If you have questions regarding your current grant status or the platform used to manage your shares, please reach out to the [Department Name, e.g., HR or Finance] team.

Thank you for your continued dedication to our collective success.

Best regards,

[Your Name]

[Your Title]