WEALTHQUANT ADVISORS
Positioning Brief

Spetember 25, 2026

01. Category

Reframe the category before nameing the firm

Not

“Financial Advisor” or “Wealth Manager”

A commoditized category where trust is already spent and the perceived value is generic portfolio management.

Instead

Proactive tax strategy for major wealth events

Equity vesting, an exit, a sale, an inheritance. A narrower, higher-intent category with far less competition and a clearer reason to act now.

02. Competitive Frame

We're not fighting other RIAs for share of mind

CPA

Reactive — files and reports what already happened. No forward planning.

AUM-Fee Wealth Manager

Portfolio-first. Tax planning is a checkbox, not the product.

DIY

Sophisticated enough to sense they're overpaying, but no coordinated, ongoing plan.

03. The Wedge

"Our advantage isn't just knowing the tax code. It's knowing when to act on it."

Every competitor claims tax expertise. Almost none sell timing as the product. This is the one claim a CPA or generalist advisor structurally cannot make — their business model is built around annual, backward-looking work.

04. Segment Priority

Lead with equity-comp and founders

Primary

Equity-Comp Professionals & Founders

- More urgent, event-driven need — a vest date or exit doesn't wait
- Stronger AEO/SEO wedge: QSBS planning, AMT on ISO exercise, RSU tax strategy
- Better fit for the “engineer founder” brand narrative

Secondary

Business Owners

Defined benefit plans, 401(k)/NQDC, and exit planning remain valuable — but as supporting content, not the lead hook or hero framing.

05. Brand Positioning

Wealth Planning. Timed Right.

Your tax-timing strategists.

For founders, equity-comp professionals, and business owners, we plan the sale, the exit, and the vesting event years in advance — so more of what you earn stays invested and compounds.

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