



Understanding Equity Compensation

Wednesday, May 7th 4:15pm ET on Zoom

The Wetzel Group is excited to share the next installment of our 2025 webinar series. We will be discussing equity compensation with Patrick Clunan from Columbia Threadneedle.

Patrick Clunan is the Head of Advisor Consulting, a value-add resource for Columbia Threadneedle Investments.

Mr. Clunan is a member of Columbia's National Speaker Bureau and has been featured as a keynote speaker at hundreds of national and regional industry conferences and events.

Join us for an informative webinar that will explore:

- What are Restricted Stock Units
- What are Stock Options
- Lifecycle of Equity Compensation
- Tax Implications and Considerations

If you have a specific question you would like to ask in advance, please email: Weliton.Sousa@morganstanley.com.

We hope that you can join us.

Feel free to share this invitation with friends, family, and colleagues.

RSVP Here

Host:



Weliton Sousa, CFP®

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Speaker:



J. Patrick Clunan, ECA

Senior Director | Head of Advisor Consulting
Columbia Threadneedle

We hope that you can join us!



L to R: Robbie Wetzel (Financial Advisor), Robert Carlson (Wealth Management Associate), Debbie Crossman (Senior Client Service Associate), Isabel Lopes (Senior Registered Associate), Weliton Sousa (Financial Advisor), Todd Wetzel (Financial Advisor)

Forbes Best-In-State Wealth Management Teams
Source: Forbes (Awarded Jan 2025) Data compiled by SHOOK Research LLC based for the period 3/31/23-3/31/24.
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