

Harness the Hustle. Build the Legacy.

About Dan Pascone:

As the **Founder and CEO** of Tailored Wealth, Dan Pascone brings firsthand experience from the frontlines of sales and revenue leadership. A former Chief Revenue Officer and veteran sales professional, Dan intimately understands the unique financial challenges and opportunities faced by sales leaders.

He built Tailored Wealth specifically to empower sales and GTM professionals to harness their fluctuating income streams for sustained financial independence.

Who We Are:

Tailored Wealth is a specialized financial planning and wealth optimization firm designed for sales professionals, go-to-market leaders, and executives focused on revenue generation. Our approach combines deep industry experience with customized financial strategies to ensure your income volatility translates into lasting financial security.

How We Serve Sales & Revenue Leaders:

- ▶ **Income Volatility Management:** *We recognize income volatility isn't a bug—it's a powerful feature. Our financial plans are engineered to stabilize and leverage income variability, creating predictable wealth accumulation.*
- ▶ **Equity Compensation Optimization:** *Tailored strategies ensure that your equity compensation aligns seamlessly with your broader financial objectives, maximizing value while minimizing tax burdens.*
- ▶ **Proactive Tax Planning:** *We focus on dynamic tax reduction strategies tailored specifically for high-income sales professionals, keeping more of your hard-earned money working for you.*
- ▶ **Comprehensive Financial Guidance:** *Our tailored financial blueprints cover retirement planning, investment optimization, and risk management, ensuring every dollar contributes to your ultimate goals.*

Insightful Resources:

[Income Volatility Isn't a Bug, It's a Feature](#)

[Smart Financial Moves for GTM Leaders & Sales Pros](#)



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