

When should you introduce Twin Peaks?

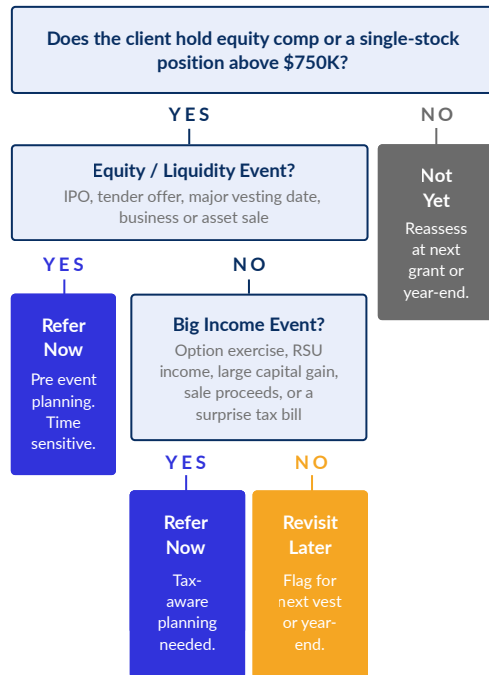
A decision tree for CPAs. Answer YES or NO at each step. Every branch ends in one of three outcomes: Refer Now, Revisit Later, or Not Yet.

HOW TO USE Pick the trigger that fits the client in front of you. Walk the questions top-down. Stop when you hit Refer Now, Revisit Later, or Not Yet.

01 / TRIGGER

Equity & Concentrated Stock

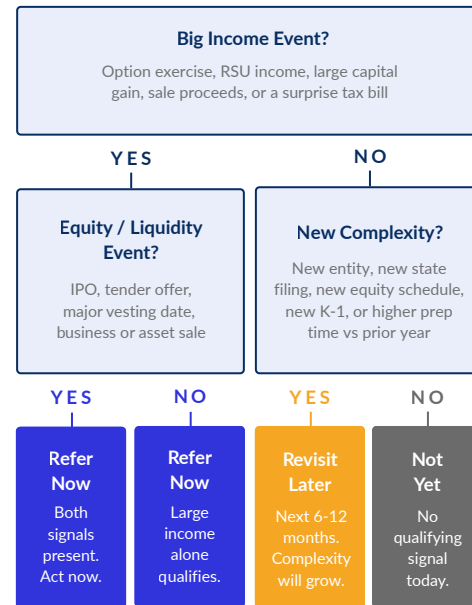
RSUs, ISOs, NSOs, founder shares, single-stock positions



02 / TRIGGER

Signals in the Tax Return

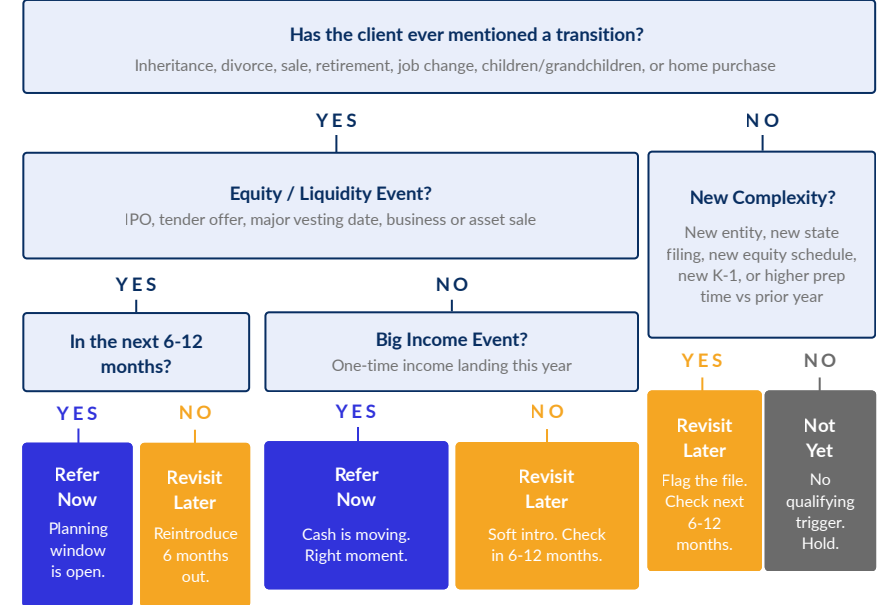
Patterns on the 1040, K-1s, and Schedule D



03 / TRIGGER

Life & Liquidity Events

Inheritance, divorce, business exit, retirement



Refer Now Right client, right moment. Send a warm intro this week – we'll loop you in on every meeting.

Revisit Later Good fit, wrong timing. Flag in your CRM – we'll prep talking points for the next touch.

Not Yet No qualifying trigger today. No action needed – the tree will catch them when it changes.