SpencerFane®

Advantage CLE: Planned Succession: Estate Planning Considerations Prior to Exiting the Business

June 25, 2024
12:00 pm CDT - 1:00 pm CDT

When business owners prepare for the sale of a business, a key part of their advisory team should include a tax, trusts, and estates attorney. Involving an estate planner prior to a letter of intent allows for tax planning options to be utilized that would not otherwise be available to the business owner if they wait until after the deal is inked to get tax advice. This presentation explains the federal transfer tax system and why it is especially relevant for business owners, key estate planning documents, and corporate documents for business owners to implement ahead of a sale, state income tax planning options, and how trusts can help business owners save money upon the sale of their business.

** HRCI and SHRM credits will be available for each session. Continuing Legal Education (CLE) credits are pending in Arizona, California, Colorado, Florida, Illinois, Iowa, Kansas, Minnesota, Missouri, Nebraska, Nevada, New York, North Dakota, Oklahoma, Tennessee, Texas, and Wisconsin. CLE credit application and approval processes vary per state and may not be available after certain state deadlines. Please email education@spencerfane.com if you have questions about credits.*