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Ryan Crayne Offers Wealth Management Tips at Exit Planning Conference

Spencer Fane attorney Ryan Crayne presented at the Davos in the Desert Maximizing Returns on Exits Virtual Conference on March 25.

The two-day conference provided valuable advice to business owners so that they can sell their companies while avoiding common pitfalls. The program, which also featured a presentation from Dave Seitter, was structured to help attendees achieve the most lucrative exits possible at the lowest risk possible and with as little friction as possible.

During his session, Preparatory Wealth Management Considerations, Ryan outlined the pros and cons of establishing trusts, explained when this step should be taken, and summarized the advantages of different trust types such as Charitable Remainder Trusts, Charitable Lead Trusts, and Grantor Charitable Lead Trusts in terms of income, capital gains, and estate taxes. He also covered topics such as age restrictions and board requirements. Ryan was joined by Tiffany House, President of Tax & Estate Strategy.

At Spencer Fane, Ryan helps clients craft effective estate plans, allowing families to transition and protect wealth for future generations. He develops a deep understanding of each individual situation to provide creative solutions that account for all eventualities while dealing with often difficult or uncomfortable topics.