

What Your Business Owner Clients Need to Know

White and Williams CLE
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From a sole proprietorship to a corporation owner, early planning can be the difference in a company's value for the next generation or a third-party purchaser. Bridget La Rosa, Counsel in the Tax and Estates Group, discussed estate planning, valuation and related topics that business attorneys should address with their business-owner clients. Her presentation covered:

- How to deal with liquidity issues facing most business owners, from buy/sell agreements, life insurance (including the use of premium financing) as well as Congressional enacted special relief such as the use of §303 and §6166 in the administration of a decedent's estate.
- When to use Grantor Retained Annuity Trusts as well as Sales to Defective Grantor Trusts and the advantages and disadvantages of each.
- Issues that arise when a client's estate includes intellectual property and considerations about how those unique assets are dealt with in the estate plan.

KEY ATTORNEYS

Bridget La Rosa

PRACTICE AREAS

Corporate and Securities

Tax

Trusts and Estates

