

## Tax Reform Seminar Series, Part IX: Strategic Estate Planning for Family-Owned/Closely Held Business Owners

October 3, 2019

### TAX REFORM SEMINAR SERIES

#### EFFECTIVE STRATEGIES TO TAKE ADVANTAGE OF THE TAX CUTS & JOBS ACT

### PART IX: STRATEGIC ESTATE PLANNING FOR FAMILY-OWNED/CLOSELY HELD BUSINESS OWNERS

Join us for the next installment of our Tax Reform Seminar Series, which will discuss estate planning for owners of family-owned and closely held businesses. Topics will include:

- Tax and estate planning strategies for owners of closely held businesses
- The importance and impact of a valuation on your transaction
- Tax affecting the earning in a valuation
- Prepositioning your company for sale
- Corporate restructuring to maximize the gifting power and minimize control risk
- Gifting versus selling
- Gifting strategies to older generations... why would you do it?

#### Speakers:

- **Renee Vidal**, Shareholder, Taxation, Trusts & Estates and Business & Corporate Departments, Flaster Greenberg PC
- **Courtney Dolaway**, Attorney, Taxation, Trusts & Estates and Business & Corporate Departments, Flaster Greenberg PC
- **Stacey D. Udell**, CPA/ABV/CFF, CVA Director, HBK Professionals & Consultants  
Director of Valuation, Litigation and Forensics for the Mid-Atlantic Region

#### Date & Time:

Thursday, October 3, 2019

Registration and Networking: 8:00 – 8:30 a.m.

Seminar and Q&A: 8:30 – 10:00 a.m.

#### Location:

Flaster Greenberg PC  
1810 Chapel Ave West  
Cherry Hill, NJ 08002

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**Credits:**

Attorneys: 1.5 substantive Pennsylvania CLE credits (NJ reciprocal)

CPAs: 1.5 PA and NJ CPE credit

CFPs: 1.5 credit hours granted by the Certified Financial Planner Board of Standards, Inc. Level of Knowledge: Intermediate

**ATTORNEYS MENTIONED**

Courtney Dolaway