
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.

Continued

Location:

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

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