

Tax Savings on Sale of Equity and Exit Events: Charitable Remainder Annuity Trusts and Malta Pension Plans

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Capaldi Reynolds & Pelosi, P.A.

The presentation will explore tax strategies to consider when a business owner or high net wealth individual is faced with a significant exit event. The strategies will include both exclusion and deferral of income, as well as charitable components. Finally, the presentation will try to marry these tax strategies with estate and asset protection planning.

Speaker:

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ATTORNEYS MENTIONED

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