



Dealing with Franchisee Trust Ownership Arrangements

November 18, 2020

Presented via live webinar.

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Franchisors increasingly are confronted with franchisee efforts to transfer their personal ownership interests to one or more trusts. The reasons for these franchisee trust ownership arrangements may vary and franchisors often are unsure how to react to franchisee use of a trust. Proper use of a trust can aid an aging franchisee population in addressing succession planning needs, while the presence of a trust can also have unintended consequences to the franchisor if the governing trust agreement is not properly structured, such as, removing franchisor protections or otherwise creating conflict with the franchise agreement. Join Lathrop GPM trusts, estates and legacy planning counsel Scott Malin and Edward Tully and franchise counsel Gaylen Knack for a panel discussion on why franchisees are utilizing trusts and what franchisors should be doing to ensure their interests are protected. Topics will include:

- Overview of trust structure, fiduciary roles and types of trusts
- Understanding the benefits of trusts
- How to handle franchisee trust ownership
- Discussion of triggering events as applied to trusts
- Pitfalls, red flags and other trust ownership issues
- Planning considerations to protect franchisor interests