



Transferring Your Family or Closely Held Business: Part Two

June 24, 2020

Presented via live webinar.

Part 2 - View Presentation

Part 2 - View Recording

Lathrop GPM attorneys Scott Malin and Steven Kutscheid will continue our discussion of business succession planning in the COVID-19 environment. This session will provide a deeper dive on the concepts addressed in part one, with an expanded discussion of financial and strategic planning considerations to maximize and protect the value of your business in preparation for sale.

Part 1

Part 1 - View Presentation

Part 1 - View Recording

Part 1 - View "Ownership Transition Planning" Outline

Lathrop GPM Trusts, Estates, and Legacy Planning Partners Ben Keller and Sally Stolen Grossman discussion of business succession planning steps you can take now. This practical primer covers management issues, including how to identify and groom your successor, develop job descriptions, and revamp your org chart. An overview of transfer tools will include GRATs, IDGTs, installment sales, and gifts and the effect of each on your control. Come ready to learn and get the information you need to stop procrastinating and start planning.