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Live 3.5-Hour May 20, 2010 Presentation

STEVEN G. SIEGEL



SELLING OR GIFTING A BUSINESS: ADVISING YOUR CLIENT

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In this May 20, 2010 3.5-hour presentation, Steven G. Siegel, a leading nationally-recognized tax and estate planning adviser, gives a comprehensive explanation of the many **tax** and **non-tax issues** which attorneys must consider when advising a client who is **disposing of a business** either by selling to a third party or gifting to family members

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STEVEN G. SIEGEL is president of The Siegel Group, Morristown, New Jersey, a national consulting firm providing tax and estate planning advice to individuals and businesses. Mr. Siegel holds a BS from Georgetown University, a JD from Harvard Law School and an LLM in Taxation from New York University. He is the author of several books, including *The Estate Planning Course Book*. Mr. Siegel is a nationally-recognized writer and speaker who has lectured extensively throughout the United States on tax, business and estate planning topics.

TOPICS

- ✓ **Giftng To Family Members**
 - succession plan, business value, gift taxes
 - liquidity issues if owner dies while owning business
 - including IRC Sections 303 and 6166
- ✓ **Buy-Sell Agreements**
 - objectives, types, taxes, suggested terms
- ✓ **Selling To Third Parties**
 - tax and non-tax issues
 - types of transactions
- ✓ **Tax Considerations In Selling**
 - parties’ preferences
 - taxable asset sale
 - taxable stock sale
 - nontaxable asset sale
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 - Objectives
 - Types
 - Suggested Terms
- Sell The Business To Third Parties
 - The Scope of the Task
 - Preliminary Documentation
 - Non-Tax Considerations
 - Tax Considerations
 - Taxable Acquisitions
 - Tax-Free Reorganizations
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