

Transition Strategies in the Family-Owned Business

The hardest yet most important step in the development of a family business is passage of leadership from one generation to the next. When should you start the process? What are all the factors that need to be considered for a smooth transition?

Agenda:

Wednesday, September 23, 1998

1:00-1:15 Registration

1:15-1:30 Welcome

1:30-2:15 Succession and Transition Strategies Overview - Michael Fay and Donald Gonson

2:15-3:00 Structure and Tax Aspects of Succession Vehicles - Linda Sherman and William Caporizzo

3:00-3:15 Break

3:15-4:00 The Dark Side: Family Business Disputes - Stories and Lessons
from a Family Business Litigator - Thomas O'Connor

4:00-4:45 Retirement Planning for Senior Family Members - Glenn
Noland, CLU, ChFC

4:45-5:00 Questions and Answers

5:00-6:30 Reception: Refreshments Served

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