

CLOSELY HELD BUSINESS & TAX PLANNING

With years of experience partnering with owners of closely-held businesses across the country, our attorneys guide clients in creating customized, cutting-edge solutions for their business structuring, transition, and succession needs.

Our Wealth, Trust & Estate Planning attorneys help our clients understand and balance their short- and long-term individual, family, and business goals. We provide advice with respect to a myriad of issues and develop a cohesive plan to address each client's specific estate, tax, and business succession planning needs. Tailored to meet the individual needs of each client, our attorneys discuss the appropriate entity (limited liability company, limited partnership, S corporation or C corporation) to use to launch a new venture, craft a buy/sell or shareholder agreement, structure pre-acquisition planning for a sale to a strategic or private equity investor, and transition the succession of the business to the next generation or key employees.

Our goal is to develop long-term relationships with our clients to fully understand the individual legal and planning needs, add significant value to the businesses they work so hard to build, form structures that continue to grow, and preserve and protect that value for future generations .

Areas of Focus

- Choice and creation of appropriate business entity (e.g., C corporation, S corporation, LLC or limited partnership)
- General business and business succession planning
- Estate and tax planning with interests in closely-held businesses
- Buy/Sell and Shareholder Agreements
- Mergers and acquisitions
- Business entity recapitalizations and reorganizations
- Corporate and partnership income tax and planning
- Key employee incentive and retention