

NEWS

Jones Presents at Hawaii Tax Institute

Speaking Engagements

11.2017

Charlotte Wealth and Estate Planning Member Chris Jones presented at the 54th Annual Hawaii Tax Institute in Honolulu, HI on November 7. Jones' presentation titled, "Show Me the Money! Monetizing the Value of the Family Business," provided an overview of the business, tax and wealth transfer planning opportunities and pitfalls that exist when a family business is sold to a third party or merged with a public company.