

NEWS

Jones Presents at NCBA Estate Planning and Probate Section Annual Meeting

Speaking Engagements
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Charlotte Wealth and Estate Planning Member Chris Jones spoke at the North Carolina Bar Association (NCBA) Estate Planning and Probate Section Annual Meeting in Kiawah Island, SC on July 28. The presentation titled, "Business Succession Planning for the Family Business," reviewed successful techniques to minimize taxes and pay for those that remain, facilitate orderly leadership changes and position the business for future success. Jones also addressed issues such as control and cash flow for the business owner, dealing with family members in the business and family members not in the business, incenting key employees, shareholder agreements, insurance strategies and complications, and exit strategies.