

Guiding you toward your goals

Business Succession Dilemma* – Fair Distribution of Assets



59
Years Old

Business
Owners
Blended Family

\$7 Million Net
Worth

VISION

Defining Your Vision

- Wanted to leave a legacy to beneficiaries without concern due to family dynamics
- Possible sale of business so tax issues a concern
- No time to manage money nor did not want to be involved in day to day management of investments

STRATEGY

Creating The Strategy

- Create an Estate Strategy to pass along Estate to children in the most tax efficient manner
- Have Corporate Shareholder Agreement reviewed to highlight any areas of concern
- Introduce discretionary portfolio management

IMPLEMENTATION

Implementing The Plan

- Estate Plan implemented by facilitating updating of Wills, Power of Attorney and Representation Agreements
- Created Joint Partner Trust to reduce probate costs in future and ensure seamless transfer of assets to beneficiaries
- Implemented strategy using Insurance to maximize Estate through use of Corporate Estate Bond
- Enlisted Tax Advisors to reorganize structure of company pending sale to reduce tax liability
- Set up discretionary portfolio accounts to remove day to day investment decision making



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