

## **Outline: Selling a Family Business: Legal, Financial, and Estate Planning Considerations**

1. Introduction on the business, legal, and estate planning issues that arise when selling a family business
2. The preparation, negotiation and closing of the sale
3. Market trends, legal issues, and tax planning ideas
4. Important legal steps a business owner should take if they are planning to sell their business in the near future
5. Important financial/business steps a business owner should take if they are planning to sell their business in the near future
6. How far in advance of a sale should a company prepare for a sale
7. What does that preparation look like
8. What are some of the key legal issues I should expect as part of the sale process
9. How do concerns about a recession and a high interest rate environment affect valuations?
10. Other relevant information about the current M&A market.
11. What other advisors does a seller need on its team?
12. On the tax and estate planning side, what big picture questions a business owner should be asking once they know that they are interested in selling a family business?
13. What is the optimal timing from a tax perspective for planning in relation to a sale and why?
14. Are there any options available to a business owner that will mitigate the tax consequences of a sale
15. If a business owner wants their children to share in the benefits of the sale, what is the most efficient way to accomplish this