

BUSINESS COUNSELING

Many of our clients are closely held and family business owners who use our firm for counsel to focus on the challenges faced by them surrounding succession planning, structuring and business control. In this role, we work closely with our clients to create a clear business vision, develop a success strategy and provide keen guidance in implementing that strategy.

We recognize the complex choices facing our clients in today's ever-changing business environment. We strive to understand their key issues, and the family and ownership dynamics affecting their decisions. With these factors in mind, we help our clients identify and address their daily and long-term challenges.

In facilitating the orderly, tax advantaged succession of our clients' businesses to the next generation, we typically employ a variety of tools, including buy/sell agreements, stockholders agreements, operating agreements, phantom ownership plans, deferred compensation agreements, family limited liability companies, family limited partnerships and favorable estate tax strategies for transferring businesses such as Grantor Retained Annuity Trusts (GRATs) and Sales to Grantor Trusts.

With our legal and financial knowledge, experience and instincts, we strive to optimize our clients' success, provide trusted counsel and assist our clients in guiding their businesses confidently into the future.