

# Checklist for Family Business Succession Planning

*Closely held business corporate exit strategies, estate planning, fiduciary considerations, and prevention of family disputes in the event of the principal's diminishing capacity*

Learn about the particular challenges faced by family-owned or closely held businesses when the principal is no longer willing or able to continue running the business. The faculty discuss best practices for business transition plans, corporate structure, managing family and business dynamics, and planning for the incapacity of the principal.

## Agenda

- **Business Succession, Exit Strategies and Corporate Law**  
Corporate exit strategy issues, including goals and strategy, financial needs of the business principal once no longer self-employed, and smooth business transition implementation
- **Estate Planning and Business Succession**  
Gradual transfers/gifting, purchasing shares/shareholding, voting/shared decision-making, how to provide for a child who is not getting a stake in the business, trusts and minimizing tax consequences, and corporate structure to protect family wealth
- **Family and Fiduciary Law: Diminishing Capacity of the Principal, Conservatorship, and Family Asset Disputes**  
Dealing with diminished capacity of the business principal and the impact on family law and conservatorship, including discussion of durable powers of attorney; managing family dynamics; healthcare proxies and other more family-side ways to avoid disputes; voting/shared decision-making in business; preparing for two types of challenge—family dynamics and business dynamics; conservatorships, guardianships, and who to get for those roles; and evaluating whether the family is qualified to run a business

## Faculty

Lisa M. Cukier, Esq., *Burns & Levinson LLP, Boston*  
Jay M. Pabian, Esq., CPA, *Rubin and Rudman LLP, Boston*  
David S. Raymon, Esq., CPA, *Burns & Levinson LLP, Boston*

## Dates & Location

Register at [www.mcle.org](http://www.mcle.org)

### LIVE WEBCAST

Wednesday, February 16, 2022  
12:00 noon–1:00 pm  
Program Number: 2220105WBC

### REBROADCAST

Thursday, March 3, 2022  
4:00 pm–5:00 pm  
Program Number: 2220105RBC

### REBROADCAST

Friday, March 11, 2022  
9:00 am–10:00 am  
Program Number: 2220105RB1

### ON DEMAND WEBCAST

View after Friday, March 11, 2022  
Program Number: 2220105WBA

## Tuition *(includes written materials)*

- \$145
- \$130.50 MCLE Sponsor Members
- \$108.75 New Lawyers admitted to law practice after 2019, Pending Admittees, Law Students, and Paralegals

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## Materials

The materials for this program include MCLE's practice reference, *A Practical Guide to Massachusetts Closely Held Business Organizations*, which, along with any other materials, can be downloaded via the link emailed to you upon registration.

Also, there is no need to take extensive notes. Two weeks after the live webcast, all registrants receive a link to a verbatim transcript of this program.

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REFERENCE # 22-020

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