

# Tax Issues in Choice of Entity & Succession Planning

*Revolutionize your business tax strategies and succession preparation*

Navigating the complex world of taxes and business structures is essential for attorneys serving entrepreneurs and business owners. Join us online to explore the critical considerations and strategies involved in advising clients for their business and planning for its long-term success.

Our expert speakers shed light on the intricacies of tax planning, entity selection, and succession planning, helping estate planners and other attorneys understand how these aspects directly impact clients' business's financial health. They delve into various tax implications associated with different entity types, such as sole proprietorships, partnerships, corporations, and limited liability companies, highlighting their respective advantages and disadvantages.

Additionally, the presentation explains the importance of succession planning and the potential tax challenges that arise during the transfer of ownership and leadership. Our knowledgeable speakers share insights on effective strategies attorneys can take to minimize tax burdens and ensure a smooth transition for clients, whether clients are passing their business to the next generation, selling it to a third party, or planning for retirement.

Gain valuable knowledge and practical tips to advise clients to optimize their business structures from a tax perspective, minimize tax liabilities, and create a robust succession plan. Whether you're an attorney practicing trusts and estates, corporate law, or tax law, this program prepares you to help clients meet their long-term goals and secure the financial future of their business.

Don't miss this opportunity to enhance your understanding of tax issues in choice of entity and succession planning. Register now and join us for an insightful discussion that can revolutionize your business tax strategies and succession preparedness.

## Agenda

- Importance of Succession Planning and the Potential Tax Challenges That Arise During the Transfer of Ownership and Leadership
- Tax Implications Associated with Different Entity Types: Sole Proprietorships, Partnerships, Corporations, and Limited Liability Companies, Including Their Respective Advantages and Disadvantages
- Strategies to Minimize Tax Burdens and Ensure a Smooth Transition for Clients, Including Clients Passing Their Business to the Next Generation, Selling to a Third Party, or Planning for Retirement
- "Ask the Experts" Q&A Session

## Faculty

Lisa M. Cukier, Esq., *Burns & Levinson LLP, Boston*, Chair; Rodney A. Bedow, Esq., *Burns & Levinson LLP, Boston*; Nikolaus S. Schuttauf, Esq., *Day Pitney LLP, Boston*; Debra Rahmin Silberstein, Esq., *Burns & Levinson LLP, Andover*



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## Dates & Location

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

### LIVE WEBCAST

Monday, October 30, 2023  
3:00 pm–5:00 pm  
Program # 2240018WBC

### REBROADCAST

Tuesday, November 7, 2023  
1:00 pm–3:00 pm  
Program # 2240018RB1

### REBROADCAST

Wednesday, November 15, 2023  
9:00 am–11:00 am  
Program # 2240018RB2

### ON DEMAND WEBCAST

View after Wednesday, November 15, 2023  
Program # 2240018WBA

## Tuition *(includes written materials)*

- \$145
- \$130.50 MCLE Sponsor Members
- \$72.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
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## Materials

*A Practical Guide to Massachusetts Limited Liability Companies* ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

## CLE Credits

Earn up to 2 CLE credits