Business Succession Planning

Family-owned businesses often look to provide for the eventual passage of ownership to a relative or the next generation, and small business owners are, in general, similarly concerned about planning for a smooth transition of management at some point down the road. Whether change is precipitated by a planned retirement or an unpredictable life event such as illness, disability or death, our attorneys can assist business owners with developing an appropriate strategic business succession plan which takes into account the relevant estate and income tax implications.

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Experience

Representative Matters

- Implemented a tax-efficient succession plan for family-owned operating and real estate businesses, enabling the orderly transfer of ownership to the next generation.
- Successfully defended an executor against challenges to a complex administration involving the succession and continued operation of privately held businesses within a multi-million-dollar estate.

Insights & More

Seminars & Events

Best Practices Make Perfect: Law Firm Management, Structure, Disputes, and Succession Planning
5.14.26

How to Ethically Close a Law Practice
5.29.25

Best Practices Make Perfect: Law Firm Management, Structure, Disputes, and Succession Planning
5.15.24

How to Ethically Close a Practice
5.10.22

Professional Responsibility in Estate Planning
9.30.20