

Family Business Succession Planning: Maintaining Key Related Party Contracts



Friday, September 25, 2020

via Zoom

10:30 am to 11:45 am

10:30 am Teleconference

11:45 am Q&A

Please join us via Zoom for a one-hour teleconference designed to help you learn how the advisory team can collaboratively and effectively plan for your business clients. As part of a monthly teleconference series offered through **WealthCounsel**, this teleconference will address the importance of enabling ownership and management of the business in family business succession planning in order to pass smoothly and with minimal disruption to the successors. A crucial aspect of the succession plan is ensuring that contractual relationships with related parties that provide goods or services to the business are not interrupted when the transition to new ownership occurs. Specific topics include:

- Leases
- Service agreements
- Employment agreements
- Other important contracts with related parties and the contractual arrangements that should be put in place to facilitate a successful transfer

- Earn 1 hour of **CLE** credit (California Board of Legal Specialization - Estate Planning)
- Earn 1 hour of **CPE** credit



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