

Buying or Selling a Private Company ©

Objective: Buying or selling a business is often the largest single transaction an individual will ever make. It can either be a dream come true, or a nightmare. This course will focus on the both the tax and non-tax factors one should consider in deciding whether to buy or sell a business. Based upon his experiences, the instructor will provide many practical tips on the purchasing or selling of a variety of businesses. Practical knowledge is increased, so you can competently advise your clients.

What you will learn:

- What motivates the buyer and the seller
- The alternatives that a buyer or seller should consider
- How to determine what the buyer is really getting
- The benefits business brokers and other intermediaries can provide
- Factors to consider in structuring the deal
- The key differences between a stock sale and an asset sale
- How to determine a fair price
- Practical tips to negotiate and close the deal
- How to protect the seller
- How to protect the buyer
- The legal issues that are frequently negotiated
- How a purchase/sale should be documented to protect your client
- Key tax issues that should be considered

CPE: 8 hours (4 hrs. Consulting/4 hrs. Tax)

Level: Basic to Intermediate

Category: Technical Consulting & Tax

Prerequisites: None

Instructor: Dennis J. Gerschick

Code: BSPC