

Business Planning & Structuring ©

Objective: This new course will integrate income taxation, estate planning, financing, legal, and practical considerations. It will highlight the planning for new legal entities, changing the structure of existing entities, and using multiple entities to achieve the goals of the owners. The focus will be on closely-held companies, although many of the concepts also apply to publicly-traded corporations.

Learning objectives:

- Point out the factors that should be considered before creating a new entity
- Identify opportunities to change the legal and capital structure of existing entities
- Assess the tax and legal consequences of creating different legal structures
- Understand the pros and cons of spin-offs, split-offs, and split-ups
- Critique commonly used structures
- Recommend new structures and state the reasoning behind the recommendations
- Integrate income tax, estate planning, asset protection, and retirement goals
- Highlight the mistakes that are often made

CPE: 4 hours (Tax – 2 hrs./ Consulting – 2 hrs.)

Level: Overview

Category: Tax & Technical Consulting

Prerequisites: None

Instructor: Dennis J. Gerschick

Code: BPAS