

Tax Planning for the Business Owner ©

Objective: For many business owners, their business is their most valuable asset and often the basis for their retirement. This course will address income, estate, and gift tax planning opportunities when dealing with a business.

Learning objectives:

- Explain the rules governing the valuation of a business interest
- Note the special rules provided by Code Sections 303 and 6166
- Describe the advantages and disadvantages of a buy-sell agreement
- Describe how a business should be financed from a tax perspective
- Explain how money can be taken out of a business, in a tax advantageous manner
- List the advantages and disadvantages of using multiple entities
- Highlight factors to consider in transferring or exiting the business
- Describe various ways to transfer a business
- Point out numerous mistakes made by business owners

CPE: 8 Hours

Level: Overview

Category: Tax

Prerequisites: None

Instructor: Dennis J. Gerschick

Code: TPBO