

“Tax Advantaged Business and Asset Sales”

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Uncle Sam’s loss is our society’s gain! Baby Boomers are the most entrepreneurial generation; and entrepreneurs are the most philanthropic. It is estimated that 10 Trillion dollars of business asset will change hands in the next 2 decades. There is a great opportunity for advisors and charities to help business owners keep more of their hard-earned assets working for them *and* benefit charities. We will walk through conversations, tactics, logistics and real-life examples of business sales and other highly appreciated assets sales using multiple planning tools.

My goal is to empower advisors and nonprofits to have more in-depth and synergistic conversations with clients and donors about the difference they can create for themselves, their family and society with a little bit of good planning.