

Guided a Business Owner in Selling his Company Interest to Irrevocable Trusts

To minimize the impact of taxes on the transfer of wealth from generation to generation, Ann Rieger guided a successful business owner in selling his company interests to carefully structured, irrevocable trusts established for the benefit of his children. The design of the plan enabled the client to maintain cash flow from installment payments made under the sale agreement, while avoiding the payment of capital gains tax. Following the conclusion of the transaction, the entire business value was excluded from the client's taxable estate resulting in significant tax savings.

PROFESSIONALS

Ann M. Rieger
Partner

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