

Thursday Insights for June 2020

2:30 p.m. – 4:00 p.m.

June 4, 2020 – Good Things Come in Threes – Modern Day Income Tax Savings Using Qualified Plans;
Presented by Trey Fairman, JD, LL.M and Rone Davis, AIF ®, CLU ®, ChFC ®, MSFS, CFP ®

You've heard discussions about 199A and the qualified business income deductions – but the conversation your business owners are really interested in is how to qualify and take advantage of both benefits...plus one more. Join Trey and Rone for a lively discussion about the options, benefits, pitfalls, and most importantly, how to have the conversation with your clients.

June 11, 2020 – When the Business Includes Real Estate During a Sale – Options and Dangers; *Presented by Greg Banner and Steve Mancini, Esq.*

The sale of real estate is often a very personal decision for families when balancing tax, cash-flow, asset protection, estate, and family concerns/opportunities – and the decisions become even more involved when the real estate is owned by the family business and succession/exit is in the near future. Should the real estate be a part of the sale? And if so, how does it affect the business value? Join Greg and Steve as they discuss how the real estate should be held, building projections, rent/lease options, investment strategies that may be more appropriate than traditional methods, the basic mechanics of the different programs, and advanced techniques you and your business owner clients can use to maximize the available financial and tax benefits.

June 18, 2020 – Keeping the Business in the Family – The 5 Stages of Business; *Presented by Shelley Lightfoot, CEPA and Danniell Wexler, Esq.*

Business owners want more time and more money. Helping your owner clients identify with and move through the Five Stages of Business will facilitate the realization of that goal. The evolution of who is responsible for separate core functions and increasing standardization of processes and reporting is key. Danny and Shelley will share a method to facilitate team alignment and empowerment, refine the directions of the company, and lay the foundation to create efficient, targeted implementation for your business owner clients.

June 25, 2020 – Marijuana, Hemp, CBD, Health, Business, Investments – Oh My!; *Presented by Kim Simms, Esq.*

Join Kim for the soup to nuts of not only the Cannabis industry but the related investment opportunities, risks, liabilities, real estate options, landlord/tenant, legislation, interstate commerce, farming, and evolving banking regulations. Learn from the experts who are working daily with these operators, business owners, investors, etc.

