

ESOPs: The Overlooked Option for Business Liquidity and Succession

Date:
Wednesday, May 9, 2012
7:45 a.m. - 11:30 a.m.

Location:
GrayRobinson, P.A.
201 North Franklin Street, Suite 2200
Tampa, FL 33602



GRAY | ROBINSON
ATTORNEYS AT LAW

NasonYeager
ESTABLISHED 1960



Who Should Attend

Business owners, accountants, financial advisors, insurance professionals, bankers or any professional who would like to learn more about the benefits of Employee Stock Ownership Plans.

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Parking

Parking is available in the Ft. Brooke Garage and will be validated.

How to Register

RSVP to 813-273-5299
or email
tamparsvp@gray-robinson.com

This program has been submitted for continuing education credits.

Advertisement

Agenda

7:45 a.m.	Registration and Networking Breakfast	10:00 a.m.	Break
8:20 a.m.	Welcome Remarks <i>Daniel M. Zugell, CLU, ChFC, LUTCF, Business Transition Advisors, Inc.</i>	10:15 a.m.	ESOP Income & Transfer Tax Benefits <i>Domenick R. Lioce, Esq., Nason, Yeager, Gerson, White & Lioce, P.A.</i>
8:30 a.m.	ESOP Basics <i>Roy A. Farmer, II Business Transition Advisors, Inc.</i>	10:45 a.m.	ESOP Company Control & Governance <i>Michael J. Canan, Esq., GrayRobinson, P.A.</i>
9:30 a.m.	Structure and Financing Sales to an ESOP <i>David J. Ottinger, Esq., GrayRobinson, P.A.</i>	11:15 a.m.	Q&A
		11:30 a.m.	Seminar Adjourns

In this seminar about *Employee Stock Ownership Plans*, you will learn:

- How business owners can sell all or part of their stock to gain liquidity while continuing their salary, benefits and control of the company.
- How to sell all or part of company ownership and pay no capital gains tax.
- How to sell stock to company employees at its full Fair Market Value.
- How to deduct 100% of payments for owner's stock, and make the company "Tax Free" to no longer pay state and federal income tax.
- How employee-owned companies operate and why they succeed.
- How an ESOP can maximize the business owner's family wealth and liquidity.

**RSVP to 813-273-5299 or email
tamparsvp@gray-robinson.com by Monday, May 7, 2012.**