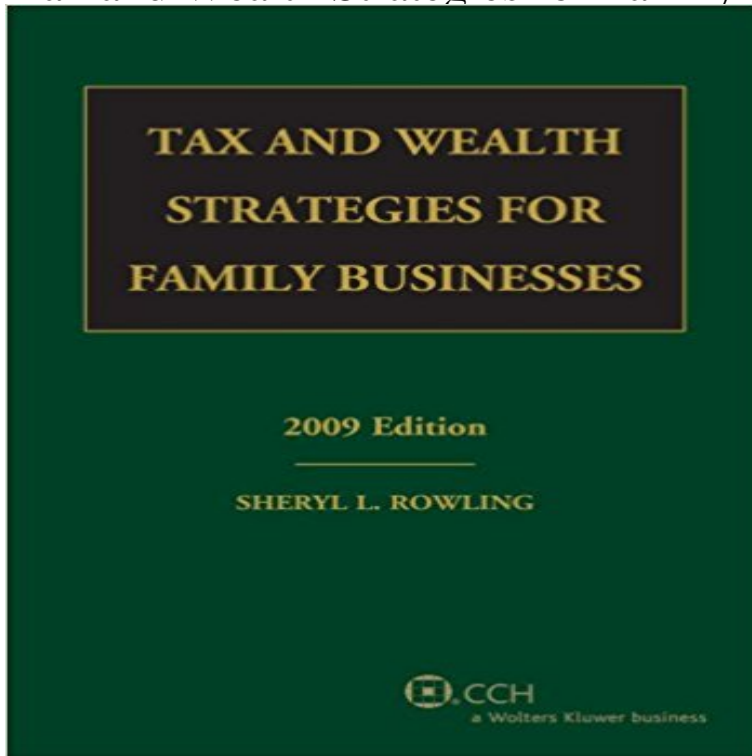


Tax and Wealth Strategies for Family Businesses (2009)



The success or failure of any family business depends in part on the industry-specific expertise of the owners and in part on the financial guidance of trusted professionals. Business owners seeking direction as well as financial professionals attempting to provide this guidance find themselves facing a daunting task. Financial issues that impact family businesses are quite diverse and require different strategies depending upon the stage of each business--start-up, operational, and exit. Tax and Wealth Strategies for Family Businesses is a one-stop reference for professional advisors of closely-held business owners - CPAs, attorneys, and sophisticated financial planners. It covers a range of tax and financial planning areas affecting entrepreneurs, their businesses, and their families. It is structured so that novice as well as the sophisticated practitioner will find useful advice and practical tools to guide their clients throughout the life cycle of a family business. This publication is divided into three main sections: the Start-Up Phase; the Operating Phase; and the Exit Phase. Each topic within these sections is covered in an easy-to-understand manner. Among the topics covered are: cash flow, risk management, tax strategies, structuring, investments, retirement planning, college funding, estate planning, and more. This strategies book includes practical worksheets and flow charts to help the advisor serve his or her clients. Highlights of the 2009 edition include: * Updated tax information for

adjustments and indexing to tax rates, deductions and credits as well as new tax laws, IRS guidance and case law including the Small Business and Work Opportunity Tax Act of 2007 and the Economic Stimulus Act of 2008. * Updated discussions and strategies for portfolio asset allocation. * Updated discussions and strategies for Traditional and Roth IRAs. * Updated discussions and strategies for estate planning for same-sex couples

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