irongroup lawyers

Business Succession Planning Workshop

This one day, hands-on workshop has been designed for Advisers who want to help clients in business partnerships put succession plans in place or, who just want a more in-depth knowledge of business succession planning.

Topics covered include:
- Scoping the clients' exit needs and mapping structural issues
- Involuntary & voluntary departures - planning & implementation issues
- Forced departures - planning & implementation issues
- Needs analysis for insurance funding purposes - type of cover & trigger events including trauma cover issues, amount of cover; business value, debt cover and tax, as well as policy ownership options.
- Financial & legal Issues - business value, payment terms, managing debt repayment, purchase price & CGT, premium pooling, managing insurance under-funding, partner sub-groupings.
- At the completion of the workshop you will be able to prepare a business succession plan that outlines the client's circumstances, needs and some suggested solutions. This will provide the basis for you to prepare an insurance needs analysis and to deliver a brief to a lawyer to help facilitate the drafting of business succession agreements for the client.

The workshop is designed to be interactive and participants are invited to bring along their own case studies.

Workshop Details

When: For latest dates refer www.irongrouplawyers.com - see Useful Information/Training.
Where: Irongroup Lawyers, Level 8, 533 Little Lonsdale St. Melbourne
Who should attend: Any Advisers wishing to understand more about business succession planning and who want to help their clients put exit plans in place including insurance as a funding mechanism. No prior knowledge required.
Workshop Fee: $1100 inc gst..

Bookings: Book now to reserve your place. Call 03 8621 9000 or email info@irongrouplawyers.com