FINANCIAL *Legacy* SYMPOSIUM

ESTATE - TAXES - SUCCESSION PLANNING

Schedule

1:00 p.m. – 1:15 p.m. Welcome

Business Owner Succession and Sale Preparation

1:15 - How to start the succession planning process

1:45 - Preparing your business for sale

2:15 - Roundtable: What you wished you would have known when transitioning

3:05 - Understanding ESOPs

3:20 - Roundtable: ESOP structure and financing

3:50 - Roundtable: Considerations from the business owner perspective

4:40 - What does a private equity deal look like?

Break-out Session: Discussions with family business owners

3:05 - Passing the torch to the next generation

3:40 - I've been in your shoes

Financial and Estate Planning

1:15 - Overview of the Estate Planning Process

1:45 - Tax Planning in Retirement

2:15 - Roundtable: Estate and tax professionals share best practices

3:05 - Elder Care and Medicaid Planning

3:35 - How to start your philanthropic giving

4:05 - Roundtable: Best Practices of Charitable Giving

5:00 p.m. – 6:00 p.m. Cocktail and Hors d'oeuvre Reception

You'll also hear best practices and discussion from these family businesses and organizations:

415 Group • Apple Growth Partners • Bixler Moore LLC • Black McCuskey
Buckingham, Doolittle & Burroughs, LLC • Citizens Bank • Hall, Kistler & Company LLP
Huntington Bank • Krugliak, Wilikins, Griffiths and Dougherty Co., L.P.A.
Layman Law Group • Stark Community Foundation • Westfield Bank
DeHoff Development • Goodwill Industries of Greater Cleveland & East Central Ohio
Kempthorn Motors • Massillon Cable • Schauer Group • Solmet Industries • Walsh University

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