Weinstock Manion
A Law Corporation

Preserving Your Legacy

Business Succession Planning

Our team of transactional, estate planning and tax attorneys collaborate with clients and their trusted financial advisors to plan for retirement, management transition and liquidity events, as well as unpredictable circumstances, such as incapacity or death. Throughout the process, we consider our clients' projected wealth, multi-generational issues and estate planning goals.

Navigating Smooth Transitions

Fulfilling the estate planning needs of business owners for over 50 years, we have the necessary knowledge and experience to create sound business succession plans. We guide clients through the process of clarifying their goals and implementing risk management tools. In this way, tax opportunities are identified and considered, surprises related to the tax implications of various exit strategies are avoided, and the possibility of disrupting business operations is minimized.

- Partnership agreements, operating agreements and buy/sell agreements
- Business formation, maintenance and disposition
- Legal and tax issues involving mergers and acquisitions

Education and Collaboration

Business succession planning is dynamic. We make sure our clients are prepared for the future by diligently tracking changes in the law, tax code and general market conditions, and collaborating with CPAs, business appraisers, investment advisors, financial planners, insurance professionals and other key professionals.

For many of our clients, financial security depends on the continued success of their closely-held businesses. Ensuring the future of their businesses through well-structured succession plans is an essential component of the estate planning process, and critical to their peace-of-mind.

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