



We'll get you there.

CPAs | CONSULTANTS | WEALTH ADVISORS

Structuring and Planning

October 9, 2024



The information herein has been provided by CliftonLarsonAllen LLP for general information purposes only. The presentation and related materials, if any, do not implicate any client, advisory, fiduciary, or professional relationship between you and CliftonLarsonAllen LLP and neither CliftonLarsonAllen LLP nor any other person or entity is, in connection with the presentation and/or materials, engaged in rendering auditing, accounting, tax, legal, medical, investment, advisory, consulting, or any other professional service or advice. Neither the presentation nor the materials, if any, should be considered a substitute for your independent investigation and your sound technical business judgment. You or your entity, if applicable, should consult with a professional advisor familiar with your particular factual situation for advice or service concerning any specific matters.

CliftonLarsonAllen LLP is not licensed to practice law, nor does it practice law. The presentation and materials, if any, are for general guidance purposes and not a substitute for compliance obligations. The presentation and/or materials may not be applicable to, or suitable for, your specific circumstances or needs, and may require consultation with counsel, consultants, or advisors if any action is to be contemplated. You should contact your CliftonLarsonAllen LLP or other professional prior to taking any action based upon the information in the presentation or materials provided. CliftonLarsonAllen LLP assumes no obligation to inform you of any changes in laws or other factors that could affect the information contained herein.

Introductions



Erik Skie
Principal
Advisory Services



Jamey Rappis
Principal
Gift, Trust and Estates



Michael Britten
Principal
Transaction Tax



Polling Question

What is the estimated timeframe for a potential ownership transition?

- 1 – 3 years
- 3 – 5 years
- 5 – 10 years
- 10+ years



Polling Question

I have updated my personal estate plans, buy-sell agreements and related business governance documents to reflect my wishes.

- Yes
- No



Transitioning Business Wealth to Family or Charity



Protection from Unplanned Life Events



Preparing for a Tax Efficient (and Less Stressful) Ownership Transition



What if My Plans (or Tax Laws or Life Circumstances) Change?



Thank you!

Jamey Rappis

jamey.rappis@CLAconnect.com

Michael Britten

michael.britten@CLAconnect.com

Erik Skie

erik.skie@CLAconnect.com



CLAconnect.com



CPAs | CONSULTANTS | WEALTH ADVISORS

©2024 CliftonLarsonAllen LLP. CLA (CliftonLarsonAllen LLP) is an independent network member of CLA Global. See [CLAglobal.com/disclaimer](https://claglobal.com/disclaimer). Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor.