

# Succession Planning



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The lawyers of Ulmer Berne have extensive experience in devising succession planning strategies for owners of privately held businesses. Our family and closely held business clients range from small business enterprises to some of the largest privately held U.S. corporations.

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We provide general corporate, tax, estate planning, employee benefits planning and other legal services to family and closely held businesses and their owners. Our lawyers are highly skilled transactional attorneys as well as experienced business advisors and counselors. The broad and extensive experience of our lawyers in this area allows us to offer a valuable combination of technical experience and practical application. This includes:

- Developing tax-efficient strategies for transferring ownership
- Recognizing competing interests among family members
- Assessing the advantages and disadvantages of sale versus retention
- Minimizing the impact of a transition on key non-family member employees
- Most importantly, assuring harmonious long-term family relationships



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