RICHARDS BUELL SUTTON LLP

Established in 1871

PRIVATE BUSINESS AND FAMILY ENTERPRISE PLANNING

Private businesses, both closely-held and family enterprises, face unique needs. The Estate and Wealth Advisory Group is focused on creating and implementing approaches that achieve the needs of each business, including:

- Tax-deferred transactions under the *Income Tax Act*, such as freezes and butterfly transactions
- Reorganizing and restructuring businesses to facilitate the introduction or exit of a key party such as a shareholder, often in the course of introducing a key employee as a shareholder, a transition between generations or a spousal breakdown
- Planning surrounding the death of shareholders, including the use of insurance proceeds and capital gains strategies
- Freezing companies in the course of restructuring, estate planning, tax planning or business planning for companies and corporate groups
- Providing succession and governance advice, including preparing shareholders' agreements
- Creating and introducing family trusts and other income splitting business structures
- Collaborating with insurance, financial, tax and family enterprise advisors, as well as the key members of the business operations, to the fullest extent to ensure the process works on paper and in practice

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Related Practices

- Business Reorganizations
- Corporate Services
- Family
- Personal Planning: Wills, Powers of Attorney, and Health Care
- Succession Planning for Privately Owned Businesses
- Trusts
- Wealth Preservation