

Creating your business legacy ...

Selling, gifting, transitioning and the tax law changes that affect your strategy



Speakers:

Jim Peterson, JD, CPA, CEO of Aware Financial, LLC

Robert Richert, JD, Bremer Wealth Management Strategist

Thursday, May 31st, 2018

Bismarck Municipal Country Club

930 Griffin Street, Bismarck, North Dakota

4:00 p.m. - 5:00 p.m.

Appetizers and beverages will be served

“I have worked my whole life making this business what it is today. Now what?”

Selling a business is the most important event in a business owner's life, and you only have one chance to get it right.

Learn how best to protect your business and estate through wills, trusts, gifts, life insurance, buy-sell agreements and more. This informative seminar will provide real-life examples and discuss how to avoid common pitfalls for the following topics:

- Structure and funding of Buy/Sell agreements — protecting yourself from unforeseen circumstances
- Coordination of financial aspects relating to your retirement — including estate planning, tax planning and retirement needs
- Potential buyers of your company — family members, employees or an outside company
- Valuation of your business — details to consider that may impact the valuation of your business

Please RSVP by Wednesday, May 23rd to Jesse Sailer

at 701-221-8549 or jrsailer@bremer.com

