Contents

Chapter 1. The Role of the Advisor	1-1
Chapter 2. Preparing the Owners	2-1
Chapter 3. Critical Conversations	3-1
Chapter 4. Values	4-1
Chapter 5. Meeting Theory and Making Decisions	5-1
Chapter 6. Control, Power, and Prestige	6-1
Chapter 7. External Systems	7-1
Chapter 8. Creating the Succession Plan	8-1
Chapter 9. Purpose of the Buy-Sell Agreement	9-1
Chapter 10. Structure of the Buy-Sell Agreement	10-1
Chapter 11. Issues of S Corporations	11-1
Chapter 12. Triggers and Payment Terms	12-1
Chapter 13. Value	13-1
Chapter 14. Funding	14-1
Chapter 15. Employment-Related Restrictions	15-1
Chapter 16. Problems for a New Loss Corporation	16-1
Chapter 17. Estate Tax Considerations	17-1
Chapter 18. Transfer Restrictions	18-1
Chapter 19. Covenants Not to Compete	19-1
Chapter 20. Gifting of Ownership Interests	20-1
Chapter 21. Redemption to Pay Taxes	21-1
Chapter 22. Installment Payment of Estate Tax	22-1
Chapter 23. Available Business Entities	23-1
Chapter 24. The Influence of the Estate Tax	24-1
Chapter 25. Estate Planning with an Unstable Tax Regime	25-1
Chapter 26. Drafting the Owner Agreement Containing	
Buy-Sell Provisions for Owner-Managed	
(Closely-Held and Family) Businesses	26-1
Chapter 27. Business Consulting Intervention Where One	
Individual Dominates the Decision Process	27-1
Chapter 28. The Short Form Owner Agreement	28-1
Chapter 29. Developing the Concept of Wealth Creation	29-1
Chapter 30. Marketing Opportunities Using the Internet	30-1
Forms	
Form 1: Shareholders Agreement	Form 1-1
Form 2: Limited Liability Company Operating Agreement	
Form 3: Limited Partnership Agreement	

CONTENTS

Form 5: Qualified Form 6: Owner Ag	Agreement	Form 4-1 Form 5-1 Form 6-1 Form 7-1
Client Presentations		
Client Presentation 1	. Accomplishing a Buy-Sell Agreement .	CP1-1
Client Presentation 2		CP2-1
Client Presentation 3	. Governance	CP3-1
Client Presentation 4	Axioms for Business Activity	CP4-1
Client Presentation 5	Estate Planning Strategies	CP5-1
Talking Points		
Talking Point 1. A	accomplishing a Buy-Sell Agreement	TP1-1
	amily Governance	TP2-1
Talking Point 3.	Sovernance	TP3-1
Talking Point 4. A	axioms for Business Activity	TP4-1
Talking Point 5. E	State Planning Strategies	TP5-1
Case Studies		
Case Study 1. P	rofessional Company Intervention —	
C	Case Study and Forms	CS1-1
Case Study 2. R	Letail Company Intervention —	
C	Case Study and Forms	CS2-1
Appendices		
Appendix A: Posting a	PowerPoint Presentation on YouTube	APP A-1
Appendix B: Website I	PDF Presentations	APP B-1
Indices		
Table of Cases		INDEX-1
		INDEX-6
	I	NDEX-10