

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 |
| Chapter 31. | Crisis Intervention | 31-1 |
| Chapter 32. | Conflict of Interest Concerns | 32-1 |
| Chapter 33. | Creating a Sustainable Planning Environment. | 33-1 |

Forms

| | | |
|---------|----------------------------------|----------|
| Form 1: | Shareholders Agreement | Form 1-1 |
|---------|----------------------------------|----------|

CONTENTS

| | | |
|---------|---|----------|
| Form 2: | Limited Liability Company Operating Agreement . . . | Form 2-1 |
| Form 3: | Limited Partnership Agreement. | Form 3-1 |
| Form 4: | Annuity Agreement | Form 4-1 |
| Form 5: | Qualified Subchapter S Trust. | Form 5-1 |
| Form 6: | Owner Agreement | Form 6-1 |
| Form 7: | Short-Form Owner Agreement | Form 7-1 |
| Form 8: | Engagement Letter | Form 8-1 |
| Form 9: | Consulting Engagement Letter | Form 9-1 |

Client Presentations

| | | |
|------------------------|---|-------|
| Client Presentation 1. | Accomplishing a Buy-Sell Agreement . | CP1-1 |
| Client Presentation 2. | Family Governance | 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 |
| Client Presentation 6. | Creating a Sustainable Planning Environment. | CP6-1 |

Talking Points

| | | |
|------------------|---|-------|
| Talking Point 1. | Accomplishing a Buy-Sell Agreement | TP1-1 |
| Talking Point 2. | Family Governance | TP2-1 |
| Talking Point 3. | Governance | TP3-1 |
| Talking Point 4. | Axioms for Business Activity | TP4-1 |
| Talking Point 5. | Estate Planning Strategies | TP5-1 |
| Talking Point 6. | Creating a Sustainable Planning Environment. | TP6-1 |

Case Studies

| | | |
|---------------|---|-------|
| Case Study 1. | Professional Company Intervention — Case Study and Forms | CS1-1 |
| Case Study 2. | Retail Company Intervention — Case Study and Forms | CS2-1 |

Appendices

| | | |
|-------------|---|---------|
| Appendix A: | Posting a PowerPoint Presentation on YouTube. | APP A-1 |
| Appendix B: | Website PDF Presentations. | APP B-1 |

Indices

| | |
|------------------------------------|----------|
| <i>Table of Cases</i> | INDEX-1 |
| <i>Table of Statutes</i> | INDEX-5 |
| <i>Subject Index</i> | INDEX-6 |
| <i>Forms Index</i> | INDEX-11 |