

Family Business Succession Planning: *Financial Issues and Opportunities*

Wednesday, October 14th
7:30-10 a.m.

USD Manchester Conference Center



Leading a family-owned business can be a gratifying experience, adding meaning and purpose to life. But it can also generate a daunting array of financial issues when the time comes for those in leadership to step down and make way for the next generation.

At companies that don't see themselves as family-owned, the end game is likely to be simple and straightforward: prepare the firm for sale and get the best price you can. For a family business, however, there are other considerations.

How can a family identify – and *achieve* – inter-generational fairness?



In an ideal scenario, we would want to see:

- Financial comfort, independence and security for those who devoted themselves to stewardship of the business over the years past
- Promising opportunities for a successor generation to take control of the business and achieve prosperity for themselves.
- The financial health of the business itself remaining sound and unimpaired.

Martin Staubus, with the Beyster Institute at UC San Diego, has been advising business owners about their succession options for more than 20 years. At our October 14th program, Martin will discuss some of the special financial issues that arise in family business succession planning and explore some useful solutions. His goal in this session is to present you with some useful ideas on how to assure positive financial outcomes for everyone in your family.

To RSVP to this event, please contact Julia:

juliarose@sandiego.edu or (619) 260-7699

Interested in attending the program for your first time as our guest?

Our door is open to you and your family!

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