

BUSINESS TRANSITIONS: SUCCESSION PLANNING AND EXIT STRATEGIES

Bulkley Richardson invites you to a series of webinars focused on business transitions with an in-depth look at your options. Every successful business owner will eventually transition to new ownership—whether through the sale to a third party or transfer to family members or trusted employees. Our team of experienced attorneys has successfully guided hundreds of businesses through these transitions.

Join Scott Foster, chair of the firm's Business and Finance Department, for a look at selling to an employee stock ownership plan, or ESOP. And welcome guest speakers, Kerry Dietz and Mike Bete, for an insider's perspective.

Session 2: Sale to ESOP

- ESOP background and structure
- Transferring some, but not all, of your equity
- Financing options
- Continued role for business owner
- Outside advisors / trustee services
- Employee engagement and retention
- Tales from successful ESOP transitions



When: Thursday, March 3 at 12pm



Where: Zoom



Kerry Dietz,
President/Managing Principal,
Dietz & Company Architects



Mike Bete,
Former President, Channing
Bete Company

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