**Email Content**

The recent discussion surrounding Stock Redemption Buy/Sell Agreements has been largely focused on clients who anticipate a future estate tax liability. While the driver of this conversation, the Connelly decision, makes this appropriate and understandable, it also created yet another reason using a stock redemption agreement may be a mistake for any business owner, regardless of net worth: The surviving owner is missing a major tax planning opportunity they could capture simply by updating the type of agreement they are using. The potential savings are massive for owners with a relatively low cost basis.

Drop me a note or give me a call if you want to take a closer look at how we’re helping advisors make sure the surviving owner doesn’t pay more in tax than they have to if they elect to sell the business.