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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: These agreements overlook a major tax planning opportunity for the surviving owner.

Give me a shout to chat about how we’re updating agreements and funding strategies to head off the issues the Connelly family encountered.

#buysellagreements #connellydecision #taxplanning