

ULTIMATE WORKSHOP

TAX, SUCCESSION, AND ESTATE PLANNING FOR BUSINESS OWNERS

Presented By:



NKCAC's Rekindle
Micro Enterprise



William E. Hesch, Esq., CPA, PFS • Amy E. Pennekamp, Esq.

Thursday, February 2, 2017, 8:00 am – 11:00 am

Northern Kentucky Chamber of Commerce
300 Buttermilk Pike, Suite 330
Ft. Mitchell, KY 41017
St. Elizabeth Board Room

Register at www.nkychamber.com/events

Benefits of Attending the Workshop:

- Identify action steps for your business which become your 2017 road map for success!
- Protect the value of your business and its long-term success.
- Avoid major business problems that would arise if you died or became disabled.
- Get answers to your CPA and legal questions. Forward your questions to Bill prior to the workshop!
- All attendees receive a one-hour complimentary follow-up consultation with Bill.

8:00 am

Session 1: Tax Savings Strategies

- Choice of Entity-Sole Proprietor, S or C Corporation
- Maximize retirement plan deductions
- Maximize your tax deductions
- Avoid IRS audit problems

9:00 am

Session 2: Succession Planning

- Avoiding the Common Mistakes Business Owners Face Upon:
**Death, *Disability, *Retirement*
- Secrets For a Successful Business Succession Plan
- Planning for disability of owner

10:00 am

Session 3: Estate Planning

- Top 10 Common Mistakes Most Estate Plans Do Not Avoid
- Top 5 Reasons Why You May Need a Trust in Your Estate Plan
- Medicaid/Elder Law Planning For Baby Boomers and Their Aging Parents



William E. Hesch

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After you meet with your attorney, CPA and Financial Planner,
contact Bill on his cell phone at (513) 509-7829 to get a second opinion and see what he can do for you.
3047 Madison Road, Suite 205, Cincinnati, OH 45209 | 513-731-6601 | www.heschlaw.com

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