

ULTIMATE WORKSHOP

TAX, SUCCESSION, AND ESTATE MISTAKES MADE BY BUSINESS OWNERS AND HOW TO AVOID THEM

Presented By:

NKY Chamber
of Commerce



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

Thursday, November 29, 2018, 8:00 am – 11:30 am

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

Register at www.nkychamber.com/events

Members: \$30, Non Members: \$45

Benefits of Attending the Workshop:

- Identify action steps for your business which become your 2018/2019 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:

Top 10 Tax Planning Mistakes

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

9:15 am • Session 2:

Top 10 Succession Planning Mistakes

- How to Plan for:
**Death, *Disability, *Retirement*
- Secrets For a Successful Business Succession Plan
- Planning for disability of owner

10:30 am • Session 3:

Top 10 Estate Planning Mistakes

- How to use a Trust and buy-sell agreement in estate plan
- How to protect family and value of business if owner dies or becomes disabled



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.
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