

## STRATEGIC ALLIANCES SERIES

Bringing You Ideas and Strategies that May Incorporate Life Insurance

### LIVE WEBINAR

Tuesday, March 15, 2022 | 9:00 a.m. Pacific Time

## Unique Business Succession and Exit Planning Ideas: Including ESOPs\* and Other Strategies

Some business owners may not have a successor in mind and want to exit the business in a profitable, tax-efficient way. An ESOP (\*Employee Stock Ownership Plan) may help this type of business owner sell the business for full fair market value, potentially defer capital gains taxes, improve employee recruitment and retention, and leave behind a tax-exempt company to the next generation. Other business owners may have an identified successor but may need to take some additional steps to ensure that the succession plan is successful. This webinar will discuss various planning strategies to help business owners who want to a) help ensure that the executive/successor has the finances to buy the business, b) save more for retirement and also leave or sell the business to the adult children, or c) maximize flexibility in the succession plan. Life insurance may be used in conjunction with these strategies to help ensure their success.

Join Rick Jaye and Stacey McMahan to learn the details of these unique business succession and exit planning ideas.

Register Now

*This webinar may provide up to 1 hour of CPE, CFP, PRP, and IWI credit\* and is intended for accounting professionals, attorneys, employee benefits providers, trust officers, asset managers, and other centers of influence. See details below.*



**Rick Jaye, AIF®, CRC®**  
Managing Director  
Business Transition Advisors (BTA)

Rick Jaye is the Managing Director at BTA and has over 35 years of experience in the financial and business planning industry. Rick is a recognized speaker at conferences around the country. He works with business owners in the succession planning process using strategies including ESOPs, recapitalization, and/or estate and gift transfers (or other types of transfers of ownership) so that the business is transferred effectively to a new ownership structure.



**Stacey McMahan, JD, CLU, ChFC**  
Advanced Designs Unit  
Pacific Life Insurance Company

Stacey has been with the Advanced Designs Unit at Pacific Life since 2008 and focuses on business planning, retirement planning, executive compensation, estate planning, and life insurance taxation.

### Filed for 1 hour of CPE, CFP, PRP, and IWI\* credit. Attendees may receive credit if all of the requirements are met:

- 1 Credit is available only for Certified Public Accountants and Enrolled Agents (CPE), Certified Financial Planners (CFP), those with designations through the American College (PRP), and those with designations through the Investments & Wealth Institute (IWI). **No insurance continuing education (CE) or continuing legal education (CLE) credit is available.**
- 2 Each attendee seeking credit must individually register, providing national producer number (if applicable), and/or all relevant credit designation numbers (CPE, CFP, PRP and IWI, if applicable), and log on individually in order to receive credit for the webinar.
  - ▶ NOTE: No credit is available if multiple attendees are using a single log-in (e.g., viewing from the financial services professional's office).
- 3 Each attendee seeking credit must attend for the entire duration of the webinar.
  - ▶ Log-on promptly at the beginning of the call and remain on for the entire hour.
  - ▶ You must answer ALL of the polling questions to ensure attendance throughout the presentation.

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### Questions

For technical assistance, please contact Zoom at <https://support.zoom.us/hc/en-us>.

For questions on CPE, CFP, PRP, or IWI credits, please contact Nadine Levin by email ([nadine.levin@pacificlife.com](mailto:nadine.levin@pacificlife.com)) or by phone at (949) 420-7134.

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Life insurance is subject to underwriting and approval of the application and will incur monthly policy charges.

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