

CLE18-332

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- ☐ Cleveland ☐ Columbus
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PROGRAM TUITION (INCLUDES ELECTRONIC MATERIALS ONLY)

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☐ ☐ **BOOK:**
\$25

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☐ ☐ **BOOK:**
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☐ ☐ **BOOK + VIDEO:**
\$100

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**Family Business Succession
Planning/Shareholder Transition:**
A Case Study Using a Holistic Approach Through
Establishing a Family Trust Company

DATE AND LOCATIONS:
OCT 10 | 8:30AM - 4:00PM

Cleveland
Cleveland Metropolitan Bar Association
One Cleveland Center, 1375 East 9th Street, 44114
Columbus
Ohio State Bar Association, 1700 Lake Shore Dr., 43204
Fairfield
Receptions Conference Center North, 5975 Boymel Dr., 45014
Perrysburg
Hilton Garden Inn, 6165 Levis Commons Blvd., 43551

P.O. BOX 16562
COLUMBUS, OHIO 43216-6562



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6.0 HOURS

OCT 10



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**Family Business Succession
Planning/Shareholder Transition:**

A Case Study Using a Holistic Approach Through
Establishing a Family Trust Company

LiveCLE



6.0 HOURS

Estate Planning, Trust and Probate Law Specialization

This seminar will offer a case study approach to learning how to address leadership succession and ownership transitions of your family business clients using an Ohio Family Trust Company.

Cleveland | Columbus
Fairfield | Perrysburg | Webcast



REGISTER ONLINE:
ohiobar.org/CLE18-332



CALL TO REGISTER:
(800) 232-7124

FEATURED SPEAKERS

Cindy L. Steeb, JD, MBA

President, CLS Consulting LLC; Cleveland



Cindy Steeb is Founder and President of CLS Consulting, LLC, where she is a consultant and advisor working with high net worth clients, private trust companies, and privately held companies to bring creative solutions to complicated estate planning and fiduciary matters. In working with clients, she draws on the experience she has gained from working with families who have experienced a liquidity event; owned a controlling

interest in a publicly traded company; or operated a privately held business enterprise. She co-authored and participated in lobbying efforts to secure passage of the Ohio Family Trust Company Act, allowing for both licensed and unlicensed family trust companies in Ohio. She has formed trust companies in Ohio, Wyoming and South Dakota, and has managed trust companies in Ohio, Wyoming and Delaware.

Keven P. Prather, CFBS

TransitioNext Advisors; Cleveland



Keven Prather is a Certified Family Business Specialist and holds a certificate of Business Succession Planning from the American College. Additionally, a member of the BEI of Exit Planning Professionals™ and the Financial Planning Association of Northeast Ohio, a certified Gilliard Group Family Business Advisor, and an approved provider of Continuing Education for CPAs. He enjoys

working closely with business owners and their key employees to plan for the eventual transfer of ownership and control so that business owners can achieve their long-term goals.

Keven P. Prather is a registered representative of and offers securities, investment advisory and financial planning services through MML Investors Services, LLC. Member SIPC www.sipc.org. Supervisory Office: 2012 W 25th Street, Suite 900 Cleveland, OH 44113 216-621-5680

DESCRIPTION

According to a Mass Mutual American Family Business Survey, it was estimated that by 2017 more than forty percent of family business owners

expected to retire, creating significant transitions in the leadership and ownership of family businesses. With the aging of the Baby Boomers, this is only anticipated to increase, creating an opportunity for advising clients on the planning that needs to be done to smoothly execute these transitions with knowledge of the options. With the 2016 passage of the Ohio Family Trust Company Act, Ohio is one of a small number of states with statutes allowing for both licensed and unlicensed family trust companies, providing a unique solution to shareholder transitions. If working with clients interested in passing their family business to successive generations, their advisors need to understand the family trust company alternative. Join us for a case study approach to learning about addressing leadership succession and ownership transitions of your family business clients using an Ohio Family Trust Company.

PROGRAM AGENDA

- 8:00 Registration**
- 8:30 Family Business Statistics: Why is Planning Important and Why is it So Hard? Considering a Process for Smooth Succession/Transition of a Family Business**
- 10:00 Setting the Stage: Case Study Video and Family Business/Shareholder Details**
- 10:30 Break**
- 10:45 Transition Strategies and an Introduction to the Family Trust Company**
- 11:15 Family Office versus Family Trust Company**
- 11:45 Lunch (on your own)**
- 12:45 Deep Dive into the Design and Implementation of an Ohio Family Trust Company as Applied to the Case Study**
- 2:45 Break**
- 3:00 Succession Planning as Applied to the Case Study**
- 4:00 Seminar Concludes**

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HOW TO REGISTER

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Phone: (800) 232-7124 | (614) 487-8585

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Ohio State Bar Association
P.O. Box 16562 Columbus, OH 43216-6562

Cancellation Policy: Cancellations received by 5 p.m. the business day prior to the program will be refunded less a \$25 office fee.

REGISTRATION FORM & TUITION ON BACK



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