



**One Hour Continuing Education Webinar
Sponsored by Westpac Wealth Partners and Guardian**

NAIFA-Arizona is pleased to be able to offer this program, at no cost, to its members

December 17, 2020
9:00 a.m. - 10:00 a.m. (Arizona time)

Click this link to register

https://zoom.us/webinar/register/WN_huvS6hJOTT2oPf8VSIY0bw

Topic: "Closely Held Business Transfer and Exit Strategies"

Do you have business owner clients who are considering options for exiting the business? Do they have family members as potential candidates for their succession plan? Do they have key employees they are considering as their successor? What are their best options? Learn ways closely held business owners can either sell their interest to a co-owner, or transfer the business to a family member during life or at death; and, various planning techniques and tax funding implications, as the business may be the most valuable asset of your clients. Case studies will be used to illustrate.



Course Presenter:

Jessica Ciccarelli, CLU, ChFC

Also featuring Guest speaker:

**Vincent M. D'Addona, MSFS, CLU, ChFC,
CEXP, RICP, CEPA, AEP (Distinguished)**



WESTPAC
WEALTH PARTNERS
PROTECT • INVEST • ACHIEVE

a member of
The
Guardian
Network

