BUSINESS SUCCESSION AND INTERGENERATIONAL PLANNING
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Business Succession – A Valuable Investment

- Planned Succession Type – Completely removed or partial retirement
- Timeframe – Implementation of Succession Strategy
- Successors – Family Members, Business Partner or other
The Business Succession Profile

• Next Generation Transfers
• Inter vivos or Testamentary
• Cash and/or In Specie
• Valuations and Financing
Business Succession – Inter vivos Transfers

• Restructuring - CGT and Income Tax and Transfer Duty considerations

• Superannuation Fund Balances

• Insurance policy matters

• Centrelink and Aged Care matters
Restructuring - Taxation, CGT and Transfer Duty

- CGT Small Business Concessions
- CGT Roll over Relief
- Trading Stock and Depreciating Assets Rollover Relief
- Access to Intergenerational Transfer Duty Relief
Superannuation – Optimal Advice

- Superannuation - Pension and Accumulation Balances
- Legally accessing your Superannuation Funds
- Taxation of your Superannuation Fund Balances
- Superannuation Strategies – A comfortable retirement
Insurance - Tailored Solutions for Peace of Mind

• Restructures - Business Insurance

• Life Insurance

• Key man insurance and Buy/Sell agreements

• Sickness and Accident, TPD and Trauma Insurance
Centrelink Assessments

• Access to Age Pension and/or Commonwealth Seniors Card

• Centrelink - Assets and Income Tests

• Gifting Rules
Aged Care

• Nursing Home Accommodation Bonds and In Care Costs

• Assets and Income Tested

• www.myagedcare.gov.au
Business Succession Testamentary Dispositions

- Legacy Planning - Preserving your assets for the Next Generation
- Income Tax and CGT considerations
- Superannuation and Life Insurance policy matters
- Asset Protection Strategies – Testamentary and Protective Trusts
Findex and the Family Office Model

Family Office Consultants – Placing your Interests at the Forefront of our Business.

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Questions

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