

Case Study on Estate Tax Reduction Strategies: Business and Investment

October 14, 2022

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In the following case study for business owners, Offit Kurman attorneys Herbert Fineburg and Charles "Max" McCauley illustrate an estate and gift planning strategy for removing your business from your taxable federal estate. This tax planning also works for your stock portfolio.

The presentation was delivered at the Philadelphia chapter of The Exit Planning Exchange's monthly conference.