



SPEAKING ENGAGEMENTS | WEBINARS

Business Succession Planning: An ESOP Case Study

DATE

May 21, 2019

12:00 - 2:00 p.m. (Eastern)

LOCATION

Webinar

SPEAKERS



**Michael G.
Paton**

Of Counsel
(Retired)

The baby boomer generation is retiring at a record pace and business owners are looking for succession planning options that can help them transition their business to new ownership. Employee Stock Ownership Plans (ESOPs) represent a compelling succession planning alternative. Using a case study from a recent ESOP transaction, this webinar will cover:

- What is an ESOP?
- Why and when an ESOP makes sense
- Benefits of an ESOP over other exit and succession planning options
- How to create, fund, and operate an ESOP
- The mechanics of an ESOP transaction
- The tax benefits of an ESOP

Featured Speakers

Andrew J. Manchir, Director Mr. Manchir is a director in Katz, Sapper & Miller's Valuation and ESOP Services Groups and provides valuation and business advisory services for various purposes with a particular emphasis on employee stock ownership plans (ESOP). These ESOP services include feasibility studies for business owners considering an ESOP, structuring and financing, and valuations and opinions needed for ESOP formations, updates, and terminations. He has performed business valuations for several other purposes, including valuations for estate and gift, mergers and acquisitions, and litigation support.

Michael G. Paton, Partner Mr. Paton is a partner with Barnes & Thornburg LLP, resident in the firm's largest office in Indianapolis, where he is a member of the Corporate Department and chairman of the Benefits and Compensation team. For over 30 years, he has concentrated his practice on the many legal issues surrounding employee benefits, including employee stock ownership plans. Mr. Paton received a B.B.A. degree with honors from the University of Notre Dame in 1982. He received his J.D. magna cum laude in 1985 from Indiana University School of Law-Bloomington.

Questions? Contact Meg Kibbe at mkibbe@btlaw.com or (574) 237-1246.