Ownership Succession Planning

50%

Some

Substantial

Limited

Substantial

Substantial

Max

Substantial

Traditional

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h Do

40%-50%

Max

Max

None

Max

Max

Delayed

Minimal

Traditional

ESOP

Innovation

0%-23.8%

Substantial

Substantial

Substantial

Substantial

You Decide!

Substantial

Max

Tax-Free!

Matrix		
Sell to	Sell to	Till Death
Outsiders	Insiders	Us Pa

23.8% - 40%

None

Limited

Max

Minimal

Minimal

None

Minimal

Traditional

Taxation

Control

Perqs

Upfront Cash

Income

Involvement

Kids/Keys

Employee

Incentive

Corp. Taxation