

Contents

Chapter 1.	The Role of the Advisor	1-1
Chapter 2.	Preparing the Owners.	2-1
Chapter 3.	Critical Conversations	3-1
Chapter 4.	Values.	4-1
Chapter 5.	Meeting Theory and Making Decisions	5-1
Chapter 6.	Control, Power, and Prestige	6-1
Chapter 7.	External Systems	7-1
Chapter 8.	Creating the Succession Plan	8-1
Chapter 9.	Purpose of the Buy-Sell Agreement.	9-1
Chapter 10.	Structure of the Buy-Sell Agreement.	10-1
Chapter 11.	Issues of S Corporations	11-1
Chapter 12.	Triggers and Payment Terms	12-1
Chapter 13.	Value	13-1
Chapter 14.	Funding	14-1
Chapter 15.	Employment-Related Restrictions	15-1
Chapter 16.	Problems for a New Loss Corporation	16-1
Chapter 17.	Estate Tax Considerations	17-1
Chapter 18.	Transfer Restrictions	18-1
Chapter 19.	Covenants Not to Compete	19-1
Chapter 20.	Gifts of Ownership Interests	20-1
Chapter 21.	Redemption to Pay Taxes.	21-1
Chapter 22.	Installment Payment of Estate Tax	22-1
Chapter 23.	Available Business Entities	23-1
Chapter 24.	The Influence of the Estate Tax	24-1
Chapter 25.	Estate Planning with an Unstable Tax Regime	25-1
Chapter 26.	Drafting the Owner Agreement Containing Buy-Sell Provisions for Owner-Managed (Closely-Held and Family) Businesses	26-1
Chapter 27.	Business Consulting Intervention Where One Individual Dominates the Decision Process.	27-1
Chapter 28.	The Short-Form Owner Agreement	28-1
Chapter 29.	Developing the Concept of Wealth Creation	29-1
Chapter 30.	Marketing Opportunities Using the Internet	30-1
Chapter 31.	Crisis Intervention	31-1
Chapter 32.	Conflict of Interest Concerns	32-1
Chapter 33.	Creating a Sustainable Planning Environment.	33-1
Chapter 34.	Product Over Process — Using a Different Paradigm	34-1

CONTENTS

Forms

Form 1:	Shareholders Agreement	Form 1-1
Form 2:	Limited Liability Company Operating Agreement . . .	Form 2-1
Form 3:	Limited Partnership Agreement.	Form 3-1
Form 4:	Annuity Agreement	Form 4-1
Form 5:	Qualified Subchapter S Trust.	Form 5-1
Form 6:	Owner Agreement	Form 6-1
Form 7:	Short-Form Owner Agreement	Form 7-1
Form 8:	Engagement Letter	Form 8-1
Form 9:	Consulting Engagement Letter	Form 9-1
Form 10:	Owner Agreement (Abridged).	Form 10-1

Client Presentations

Client Presentation 1.	Accomplishing a Buy-Sell Agreement .	CP1-1
Client Presentation 2.	Family Governance	CP2-1
Client Presentation 3.	Governance	CP3-1
Client Presentation 4.	Axioms for Business Activity	CP4-1
Client Presentation 5.	Estate Planning Strategies	CP5-1
Client Presentation 6.	Creating a Sustainable Planning Environment.	CP6-1

Talking Points

Talking Point 1.	Accomplishing a Buy-Sell Agreement	TP1-1
Talking Point 2.	Family Governance	TP2-1
Talking Point 3.	Governance	TP3-1
Talking Point 4.	Axioms for Business Activity	TP4-1
Talking Point 5.	Estate Planning Strategies	TP5-1
Talking Point 6.	Creating a Sustainable Planning Environment.	TP6-1

Case Studies

Case Study 1.	Professional Company Intervention — Case Study and Forms	CS1-1
Case Study 2.	Retail Company Intervention — Case Study and Forms	CS2-1

Appendices

Appendix A:	Posting a PowerPoint Presentation on YouTube.	APP A-1
Appendix B:	Website PDF Presentations.	APP B-1
Appendix C:	Creating the Owner Agreement — Power Point Presentation and Spreadsheet	APP C-1

CONTENTS

Indices

<i>Table of Cases</i>	INDEX-1
<i>Table of Statutes</i>	INDEX-5
<i>Subject Index</i>	INDEX-6
<i>Forms Index</i>	INDEX-11

