

## DEFINING YOUR BUSINESS LEGACY

### Implications and Impacts to Consider in Business Succession Planning

Date	April 25th, 2017
Time	11:30am - Registration and lunch 12:00 - 1:00pm - Program and questions
Location	Hoge Fenton Office 60 S. Market Street, 2nd Floor San Jose, CA 95113

### Join Us

for an in-depth conversation on what it takes to successfully transition your business. Understand how to structure your team and the key steps to a business transfer.

RSVP with Maria at [maria.dicristo@hogefenton.com](mailto:maria.dicristo@hogefenton.com) or 408.287.9501

### About the Speakers



Shruti Gauba is a Vice President with J.P. Morgan Private Wealth Management in Palo Alto. She works with clients to deliver the firm's comprehensive platform comprising estate and wealth planning, investment advice, traditional banking products, and credit.



Erik Hendrickson is a Wealth Strategist for J.P. Morgan Private Bank's business in the West with over 20 years of wealth management experience. He advises on a range of wealth matters including: multi-generational wealth transfer, pre-transaction planning for business owners, planning for corporate executives, philanthropic planning and retirement planning.

Peter Feinberg, an attorney at Hoge Fenton, is driven by helping his clients achieve their goals. His successful deals have included formation, structuring and re-organizations of corporations, limited liability companies and partnerships; corporate and real estate debt and equity finance; mergers and acquisitions; commercial contracts; real estate leasing and purchase and sale agreements; and venture capital transactions.

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Julie Y. Wann is a member of Hoge Fenton's Corporate, Tax, and Estates & Trusts groups. She focuses on individual, partnership, and corporate taxation, and formation of limited liability companies, partnerships, and corporations. She structures real property transfers that preserve the real property tax basis.

\*J.P. Morgan is not responsible for information provided by guest speakers or the use by attendees of such information. Hoge Fenton is not affiliated with JPMorgan Chase & Co.

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\*The strategies discussed often involve complex tax and legal issues. Your own attorney and other tax advisors can help you consider whether the ideas illustrated here are appropriate for your individual circumstances. JPMorgan Chase & Co. does not practice law, and does not give tax, accounting or legal advice. We are available to consult with you and your legal and tax advisors as you move forward with your planning.

## Related Attorneys

- Julie Y. Wann