



Succession Planning: Drafting a Plan to Protect Your Business Owner Clients

Developed with Cornerstone Companies, The Official Insurance Partner of KCMBA

Tuesday, September 20, 2022 • 4:00 – 4:50 PM

KCMBA Event Center or Live Webinar

Webinar/Access link sent upon registration

Credit: Missouri – 1.0 / Kansas – pending

Cost: Free for KCMBA Members

DESCRIPTION

This program will introduce attorneys to the basics of forming and funding a succession plan that is essential to providing proper counsel to privately held businesses. Planning ideas from drafting a buy/sell agreement, the purchase of key person insurance to using income protection and overhead expense insurance products to keep the business open will be provided.

SCHEDULE

4:00 PM Program

John Gilliford Jr., *Cornerstone Companies, The Official Insurance Partner of KCMBA*

4:50 PM Adjourn to happy hour provided by Cornerstone Companies, *The Official Insurance Partner of KCMBA*

Program will be held in hybrid format
Zoom Access link will be sent upon registration

4 WAYS TO PRE-REGISTER:

1. **Online** at kcmba.org
2. **Mail** completed registration form with payment to KCMBA, 2300 Main St., Suite 100, Kansas City, MO 64108.
3. **Fax** (816) 474-0103
4. **Phone** (816) 474-4322

For programs with a fee

Cancellations received 48 hours or more prior to the start of an event may receive a refund minus a \$25 processing fee, or a credit voucher in the full amount of the fees paid which will be valid for one year from the date of the event.

Substitutions for paid registrations are accepted. Credit vouchers are transferable.

No shows will not receive a refund or credit voucher. A request for refund due to emergency or hardship must be received in writing no more than 30 days after the event date.

Special accommodations: KCMBA is striving to be more available, accessible and welcoming of all. For questions about accessibility or to request an accommodation, please contact KCMBA at (816) 474-4322 or committee@kcmba.org. Requests should be made at least 48 hours prior to the event or visit.

KCMBA.org

*Course materials will be sent prior to the program.



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REGISTRATION: 22_127



****Please Print Clearly****

NAME _____

FIRM _____

ADDRESS _____

CITY _____ **STATE** _____ **ZIP** _____

OFFICE PHONE _____

E-MAIL ADDRESS _____

PAYMENT INFORMATION

Cost: Free for KCMBA Members \$80.00 for Nonmembers

Credit Card:

☐ American Express ☐ Discover ☐ MasterCard ☐ VISA

Card No. _____

Exp. Date _____ CVC# _____

Cardholder Name _____

Check No. _____ *Make checks payable to KCMBA*

A KCMBA CLE opportunity made possible, in part, through a generous endowment from Davis, Bethune & Jones, LLC