

Choice of Entity Fundamentals & Workshop

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Today's Panel of Contributors

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Who's Your Client?

Know your client and their business objectives

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Know Your Client's Business Objectives

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Rules of Professional Responsibility

- Represent an individual?
 - Multi-party representation
 - Spouses
 - Represent the entity?
 - Prior client relationship?
 - Informed consent?
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Start with the client's objectives

Quality business planning requires identifying one or more specific client objectives, not just "I want to form or reorganize my business to make more money." A non-exclusive list of factors may include one or more of the following:

- Allowing workers, investors, or family to participate (stakeholders)
 - Type of Business
 - Asset protection
 - Exit strategy
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2024 Choice of Entity Fundamentals session

"Choice of Entity Fundamentals: Part One"