



ATL Network
ADVISORY THOUGHT LEADERSHIP

What's the Risk? Buy | Sell Agreements



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Chair



Colin Simkin
Partner

www.atlnetwork.com.au

Keynote Speaker: Ian Satill

- Director, Curo Financial Services
- Over 30 years advisory experience
- Regularly referenced in 'Money Management' and 'Financial Review'
- Ian's passion ... numerous times he has witnessed his clients' lives being changed as a result of having suitable and adequate insurance
- Special Risk Managers



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What we will cover

What is the impact to a business if something happens to one of the partners or key people in the business.

Strategies to mitigate ownership / key man risk.

Analyse the effect of death, disability or major trauma to a Key Person or Shareholder on the business, it's lenders, customers, suppliers and also the family of that individual.



1. Practice overview

Please provide a brief outline your practice
– size, location, type of clients and main
services etc.

In particular, please describe your specialist
risk experience and expertise in developing
buy-sell solutions.



2. Most Significant Risk

What do you see as some of the most significant business risks Business owners are facing – many of which would be clients of the advisory firms tuned into today's webinar?



3. Key person risk

Let's talk about a key person in a business.
Who is a key person?

What are some of the common issues that
need to be addressed in 'de-risking' the
business?

What are some of the solutions available?



4. Surviving Shareholders / Partners

Let talk about 'surviving shareholders / partners' within a business?

What are some of the consequences that need to be worked through and what are some of the solutions available?



5. Impact

What about the impact on family Members
of the 'deceased' key-man or business
partner?



6. Key Elements

For a well-structured, buy-sell agreement what are some of the key elements of the structure and what benefits will it bring?



7. Common Issues

What are some of the common issues you have seen poorly structure buy-sell agreements?



8. Changing needs

What about the changing nature of business, lives and needs.

From a practical perspective how often should a buy-sell structure be reviewed?

What are some of the consequences you have seen from inaction?



9. Recommendations

What would be your recommendation to professional advisors in addressing these issues with their clients?



Next Step

Option 1

Partnership Program

Start today: Program to assist your firm to provide Buy-Sell Solutions for your clients.

Option 2

Your Practice Solution

Start Today: Review your own 'Buy-Sell Solution' and see process in action.

Option 3

Buy-Sell Technical Update

Register: Receive specialist technical communications on Buy-Sell Solutions.

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Mark your Calendar



Tuesday 29th Nov, 12 - 1 AEDT
ATL Digital
Dynamic Media Solutions for Accountants

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Thank you



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