

Business Succession + Legacy Planning

Every owner inevitably exits; the question is “on what terms?” We believe that business succession is specific to each client and the management teams, families and unique casts of successors involved. At Kegler Brown, we look beyond the numbers, taking a holistic and practical approach to legacy planning. Our team-based philosophy is collaborative, so we first focus on developing a meaningful understanding of our clients’ businesses before addressing critical planning strategies.

Our team includes some of the most highly regarded succession planning attorneys in the region. Our client partners trust our work and identify with the counsel we’ve provided to our prominent home-grown clients, including many of central Ohio’s best-loved companies and their owners.

Our Services

- + **Tax planning:** avoiding double taxation; achieving taxation at lowest rates; minimizing estate and gift tax transfer costs
- + **Leadership:** maximizing opportunities for successful transition and succession; assisting in identifying successors
- + **Compensation:** assisting in successful transitions for all potential stakeholders, including appropriate incentives
- + **Strategy alternatives:** mergers and acquisitions; ESOPs; management buyouts
- + **Buy-sell agreements:** proactive planning that provides for succession upon death, disability and early retirement to avoid business stalemates
- + **Financial and estate planning**

Our Clients

We primarily represent private companies and their owners throughout Ohio. We also specialize in serving the unique needs of first and subsequent generations of business owners.

Some of our key clients include:

- + **Donatos Pizzeria**
- + **J.E. Grote Company**
- + **Resource**
- + **Atlas**
- + **Capital City Group**

Contact Us

For more information on our business succession and legacy planning services, please contact Chuck Kegler.

Our Team

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