



## Intra-family Sales

Experienced and insightful, the firm's Private Wealth attorneys structure intra-family sales to facilitate the transfer of a family business or other assets to optimize opportunities, manage risk and achieve financial and estate planning objectives.

Advising high net worth individuals and their families is a marquee practice for Neal Gerber Eisenberg. We are always looking ahead, collaborating with the family's trusted advisors and fiduciaries to craft and maintain tax-efficient estate plans to transfer wealth from one generation to the next.

Intra-family sales and related business transfers offer tax minimizing options for transferring assets such as a closely held business or real estate holdings to next-generation family members. In one such situation, the assets were sold to a trust for family members in exchange for a promissory note, effectively shifting future appreciation on the assets to the heirs free of income, gift or estate taxes.

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### KEY CONTACT

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