

The Impact of Private Equity on Estate Planning for Small Business Owners

Presented by the MCBA Trusts & Estates Section and the Estate Planning Council of Rochester

Wednesday, October 29, 2025 - 8:30 AM - 10:30 AM

In person only at Harris Beach Murtha - 99 Garnsey Rd

Private equity deals can create sudden wealth and new estate planning challenges. Join us to explore how small business owners can safeguard assets, minimize taxes, and plan for the future. Real-life examples will show you what works before and after a liquidity event.

Presenters:

Richard E. Owens, Lorraine Capital & **Michael R. Overmyer, Esq., Partner, Lippes Mathias LLP**

MCLE: 0.5 Ethics and Professionalism, 0.5 Skills, and 1.0 Professional Practice

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