



Wally Head and Kim Kamin Present on Pre-Transaction Planning to Improve the Likelihood and Benefits of a Liquidity Event

CHICAGO – October 1, 2019 – Wally Head, Gresham’s Vice Chairman, led a panel at The Entrepreneurship Institute of Chicago’s Presidents’ Symposium on September 11, 2019, and Kim Kamin, Gresham’s Chief Wealth Strategist, participated as a panelist.

This panel grew out of a recognition that business owners should always be aware of the potential need for a future liquidity event and planning should start well ahead of when it might occur. The panel, which also included a former family business owner and an attorney who counsels business owners regarding liquidity events, shared their real-world experiences and answered questions from the audience consisting of family business owners and advisors.

The panelists discussed planning for who or what type of firm will be the successor owner(s), preparing family members and members of management for a transition, determining when a transition should occur, and structuring a transition to balance financial, tax and family considerations. The focus of the panel was on how proper pre-transaction planning can improve the likelihood a transaction will occur when it should occur, and not when it must occur for financial or family reasons, and that the transaction will be structured to optimize current as well as longer-term benefits.

If you would like more information about pre-transaction planning Gresham makes available to its clients, please contact Kim Kamin at kkamin@greshampartners.com or Wally Head at whead@greshampartners.com. Either of them can also be reached at 312 327 5020.

About Gresham

Gresham Partners is an independent investment and wealth management firm that has been serving select families and family offices as a multi-family office and an outsourced chief investment officer since 1997. Gresham is wholly owned by its senior professionals, client fees are its sole source of compensation, it avoids conflicts of interest that affect many other firms and it acts as a fiduciary dedicated to serving its clients’ best interests. For more information about Gresham, please go [Here](#).