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Documents to Consider: Business Agreements

- Operating Agreements
- Partnership Agreements
- Shareholder Agreements
- Buy-Sell Agreements
- Contracts of Sale
- Certificates of Ownership



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Options at Death

- Mandatory sale of decedent’s interests to remaining shareholders and/or partners
- Decedent’s estate may “put” to the entity or other
- Restricted group that can inherit (ex. descendants)
- Unrestricted group can inherit
- Right of First Refusal



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Estate Plans

- Why it’s important for your estate plan to be harmonious with your corporate documents
- *Blechman v. Estate of Blechman*



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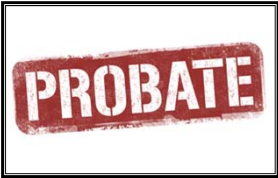
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Why is it important for attorneys to review corporate documents?

- *Finlaw v. Finlaw*
- Avoid probate
- Make sure intended distributions actually occur



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Business Valuations

- Business appraisals
- Types of formulas



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A True Story



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**Henderson|Franklin**  
ATTORNEYS AT LAW

**Anthony Cetrangelo, Esq.**  
[anthony.cetrangelo@henlaw.com](mailto:anthony.cetrangelo@henlaw.com)  
(239) 344-1358

**Amanda Dorio, Esq.**  
[amanda.dorio@henlaw.com](mailto:amanda.dorio@henlaw.com)  
(239) 344-1362

**Eric Gurgold, Esq.**  
[eric.gurgold@henlaw.com](mailto:eric.gurgold@henlaw.com)  
(239) 344-1162



henlaw.com

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