

Representing Family and Closely Held Businesses

Unique issues are at the heart of every small business. Representing them requires a broad understanding of many practice areas. In this popular seminar, our experienced faculty from diverse areas of practice will help you manage the intersection of business strategies, family dynamics, taxes, IP, and estate planning.

What previous attendees have said about this seminar:

"Wonderful! Broadly based, with a good amount of time for each session."

"Left me feeling more comfortable advising small businesses."

"Substantial insights and perspectives."

"I now have a better handle on current tips and traps in setting up small businesses."



LIVE PRESENTATION
April 17, 2015

Ambridge Event Center
1333 NE MLK Jr. Blvd.
Portland, OR

6.5 General or Practical Skills
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Zimmer Family Law, LLC

Program Schedule

8:00 a.m.	CHECK-IN AND CONTINENTAL BREAKFAST
8:25	WELCOME
8:30–9:15	Employment Law Concerns for Small Businesses – Richard F. Liebman <ul style="list-style-type: none"> ■ Potential company liability under employment laws ■ Necessary changes to employee handbooks ■ Wage and hour traps ■ Preventing workplace harassment ■ Substance abuse issues with Measure 91 ■ Upsurge in intern challenges ■ EEOC initiatives ■ Status of Oregon paid sick leave statute
9:15–10:00	Oregon's New Crowdfunding Legislation – Mary P. Hull, James M. Kearney <ul style="list-style-type: none"> ■ Overview ■ The good, the bad, and the ugly ■ Mitigating the bad and the ugly
10:00–10:15	BREAK
10:15–11:00	Effect of Divorce on the Small Family Business – Charles Wilhoite, CPA, Gary J. Zimmer
11:00–11:45	Tax Planning for Closely Held Businesses – Mark F. LeRoux, Michael J. Millender <ul style="list-style-type: none"> ■ Tax strategies in entity formation ■ Planning for business expansion ■ Employee incentives ■ Planning for the sale of the business ■ Update on tax law changes affecting closely held businesses
11:45–1:00	LUNCH (on your own)
1:00–1:45	Estate Planning for Owners of Closely Held Businesses – Emily V. Karr <ul style="list-style-type: none"> ■ Succession planning and transfers—different approaches in transferring the family business to the next generation ■ Payment of and current developments in estate tax ■ Valuation issues in a buy-sell agreement or other lifetime transfer agreement and when a business is being transferred by gift or a death

1:45–2:30	Mergers, Acquisitions, and Sales of Closely or Family Held Businesses – Adam D. Rose <ul style="list-style-type: none"> ■ Evaluating exit strategy options ■ Management, voting control, and deadlock provisions ■ Valuation/pricing formulas, methods, and earn-outs ■ Employment, termination, nondisclosure, and non-competition aspects ■ Managing the family business dynamic
2:30–2:45	BREAK
2:45–3:30	Forming a New Business: Choosing the Best Form of Entity – David C. Culpepper <ul style="list-style-type: none"> ■ Business, management, liability protection, partnership, and tax considerations ■ Choosing whether to use a corporation, partnership, or limited liability company for a new business
3:30–4:15	Top 10 Intellectual Property Issues for Small Businesses: How to Issue Spot and Advise Your Client on IP Issues – Leigh F. Gill <ul style="list-style-type: none"> ■ Confidentiality: preserving and maximizing the value in ideas ■ Avoiding mistakes and selecting an appropriate trademark ■ Using internet images for the business website ■ Whose idea is it? Securing rights from employees and contractors ■ Software licensing ■ Building a brand: Marketing 101 ■ Copyright and trademark registration ■ Advising clients about patents, from the non-patent bar perspective ■ Open source, creative commons, and standards ■ Sharing the credit: Cross licensing, joint development, and developing a market
4:15 p.m.	ADJOURN

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Program Products

Even if you cannot attend, you can still get the program on CDs or DVDs. Use the order form in this brochure to order your set today! OLI Annual Pass holders may purchase the products at 50% off the full retail price.

Questions?

Please call OLI at (503) 768-6580 in Portland or toll-free in Oregon at (800) 222-8213, e-mail us at oli@lclark.edu, or visit our website at <http://go.lclark.edu/oli>.

Registration/Order Form

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Please "✓" appropriate box below:

TUITION: Registration includes electronic course materials. Printed materials are available for an additional \$15. (A link to a PDF of the materials will be emailed prior to the seminar date.)

EARLY REGISTRATION (received by April 13, 2015):

- ☐ **\$189** Early registration
- ☐ **\$139** New attorneys (admitted 2013-2015) and legal staff
- ☐ **\$95** Legal aid attorneys
- ☐ **\$15** OLI Passholder (OLI Pass No. _____), law students, and Oregon judges and their lawyer staff
- ☐ **\$15** Attorneys attending with their Mentor from an approved Bar Mentor Program (call OLI or go to <http://go.lclark.edu/oli> for details). Mentor's name: _____
- ☐ **\$15** Print materials
- ☐ **\$20** Add to above tuition if registration received after April 13, 2015

LIVE WEBCAST REGISTRATION: Can't attend in person? OLI offers a simultaneous live webcast option allowing you to "attend" the program from the convenience of your office. This program will be broadcast LIVE online on Friday, April 17, 2015, starting at 8:30 a.m. Pacific Time. You may access this event from anywhere with an established internet connection. The webcast will include video and audio of the speakers and seminar handout materials. To register for the live webcast, please go to our website at <http://go.lclark.edu/oli> and click on "Webcasts."

DVDs, CDs, AND COURSE BOOKS:

I am unable to attend. Please send me:

- ☐ **\$209** Audio CDs and print course book
- ☐ **\$309** DVDs and print course book
- ☐ **\$59** Print course book only
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- ☐ **\$9.00 Note: Add \$9.00 shipping and handling fee to above product orders.**

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CONFIRMATION: Confirmation will be sent via e-mail.

CANCELLATION POLICY: Tuition minus a \$20 handling charge will be refunded if the cancellation request is *written and received* by Monday, April 13, 2015.

NEED ASSISTANCE: If you are a person with a disability, please let OLI know in time to make any necessary accommodations for you.

TUITION ASSISTANCE: A limited number of scholarships are available based on financial need. Contact OLI.

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