The Barlow Group at Morgan Stanley

Unlocking the Value of Your Privately Held Family Business

Morgan Stanley

Owners of most privately held family businesses share many of these traits:

1. they have dedicated their lives to growing a business,
2. they understand what it takes to achieve success,
3. they realize a significant portion of their personal wealth is tied to the performance of their family business,
4. they are beginning to look for solutions to help gain access to the wealth they have created inside their family business, and
5. they would like to ensure their family wealth transfer and business succession plans are comprehensively addressed.

Owners of privately held family business often have an interest in remaining at least partially involved in the companies they started.

When it comes to unlocking the value of your privately held family business, we believe we can help you evaluate your options.

One option might be to:

Sell part, or all of your family business in a tax advantaged manner to an ESOP (an ESOP is an Employee Stock Option Plan).

An increasing number of privately held family businesses are turning to employee stock ownership plans (ESOPs) to address investment liquidity and diversification, while resolving matters of wealth transfer and business succession.

An ESOP gives a business owner the opportunity to sell a partial interest in his or her company at full fair market value, while still maintaining total operating control.

ESOPs also offer meaningful benefits to company employees and can provide certain tax-advantaged benefits to selling shareholders. In addition, they can help to provide for the estate and management succession planning needs of a privately held family business.

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Want to learn more about ESOPs, or other services we can provide to owners of privately held family businesses?
Please call us at: (309) 671-2868 or Email us at: todd.barlow@morganstanley.com

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