

Installment Sales to Grantor Trusts: Tips for Business Owners

By: Stephen B. Daiker, Esq. and
Martin M. Shenkman, Esq.



**A KEY ESTATE
PLANNING GUIDE**

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What is a note sale for estate planning purposes

- Simple example of what it is.
- Why this technique can benefit you:
 - Estate freeze
 - Valuation discount
 - Tax burn
 -and more

Additional considerations of note sales

- Should you recapitalize and sell only non-voting stock?
- Does this impact your liquidity?
- What if I change my mind?
- What if the note matures?

Additional information

- Contact sdaiker@harrisonheld.com