Exit & Succession Tax Planning Training Course

Professional Development Training Course Outline

Category	Taxation and Revenue	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Exit & Succession Tax Planning Training Course provides participants with a comprehensive understanding of the tax implications and strategic considerations involved in business exits, ownership transfers, and succession planning. It focuses on developing tax-efficient structures that minimize liabilities during the sale, transfer, or inheritance of business assets, while maintaining full compliance with both domestic and international tax regulations. Participants will explore practical approaches to structuring buyouts, mergers, acquisitions, and estate transfers that safeguard wealth and ensure business continuity across generations.

The course also examines critical issues in family business succession, including governance, valuation, estate taxation, and capital gains management. Emphasis is placed on aligning exit strategies with broader financial, legal, and personal objectives to achieve seamless transitions. Through real-world examples and case studies, professionals will learn to design and implement integrated exit and succession plans that balance tax efficiency, wealth preservation, and long-term business sustainability in an evolving global tax environment.

Programme Curriculum

Exit & Succession Tax Planning Training Course

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Course Objectives:

By the end of this course, participants will be able to:

1. Understand the tax implications of business exits, mergers, and ownership transfers.
2. Design tax-efficient exit and succession strategies tailored to business structures.
3. Apply capital gains, inheritance, and gift tax principles to ownership transitions.
4. Evaluate the use of trusts, holding companies, and estate planning vehicles.
5. Manage valuation, buyout, and equity restructuring for tax optimization.
6. Navigate cross-border exit planning and international tax implications.
7. Ensure compliance with anti-avoidance, disclosure, and reporting requirements.
8. Develop family governance frameworks for intergenerational wealth transfer.
9. Integrate philanthropic giving into exit and succession planning.
10. Assess the role of private equity, venture capital, and investors in exits.
11. Formulate tax strategies for entrepreneurs and retiring shareholders.
12. Mitigate risks associated with exit timing and market volatility.
13. Align exit planning with legacy, continuity, and long-term wealth goals.

Target Audience:

- Business Owners and Founders
- Tax Consultants and Advisors
- Financial Planners and Accountants
- Estate and Wealth Managers
- Family Office Executives
- Corporate Lawyers and Legal Advisors
- M&A and Private Equity Professionals
- Succession and Governance Consultants

Course Duration: 5 days

Course Modules:

Module 1: Fundamentals of Exit & Succession Planning

- Definition, objectives, and key drivers of exit and succession planning
- Importance of early tax planning in exit strategies
- Identifying succession options and transition models
- Common challenges in ownership and leadership transitions
- Tax and regulatory frameworks influencing exit decisions
- **Case Study:** Tax consequences of a business owner’s exit strategy

Module 2: Taxation of Business Transfers and Exits

- Capital gains tax implications on sale or transfer
- Asset vs. share sale considerations

- Rollovers, deferrals, and exemptions
- Managing goodwill and intangible asset taxation
- Exit tax regimes and international implications
- **Case Study:** Structuring a tax-efficient sale of a family enterprise

Module 3: Estate, Gift, and Inheritance Tax Planning

- Estate and inheritance tax rules and thresholds
- Lifetime gifting and family trust planning
- Wealth transfer and generation-skipping strategies
- Coordinating wills, trusts, and corporate ownership
- Valuation and liquidity management for estates
- **Case Study:** Succession planning for multi-generational families

Module 4: Family Business & Intergenerational Succession

- Family governance and continuity planning
- Leadership succession and ownership transitions
- Family constitutions and shareholder agreements
- Managing family disputes and succession challenges
- Tax-efficient equity redistribution among heirs
- **Case Study:** Intergenerational ownership transfer in family firms

Module 5: International and Cross-Border Exit Planning

- Tax residency and exit taxation considerations
- Cross-border asset transfers and treaty implications
- Managing double taxation and withholding taxes
- Offshore trusts and estate planning vehicles
- Expatriation tax and mobility considerations
- **Case Study:** International exit planning for global entrepreneurs

Module 6: Private Equity, M&A, and Investor Exits

- Structuring investor exits and buyouts
- Taxation of capital distributions and carried interest
- Shareholder agreements and earn-out structures
- Venture capital and IPO exit tax planning
- Managing risks in strategic acquisitions and divestments
- **Case Study:** PE-backed exit strategy and post-sale structuring

Module 7: Philanthropy and Legacy Planning

- Integrating charitable giving into succession strategy
- Donor-advised funds and private foundations
- Tax incentives for philanthropic contributions
- Social impact and legacy planning frameworks
- Balancing financial goals with societal contributions
- **Case Study:** Designing a philanthropic exit strategy

Module 8: Risk Management & Compliance in Exit Planning

- Tax audits, disclosures, and reporting obligations
- Anti-avoidance legislation and GAAR applications
- Managing confidentiality and valuation risks
- Legal documentation and due diligence processes
- Developing compliant and ethical exit strategies
- **Case Study:** Regulatory risk assessment in exit planning

Training Methodology:

- **Instructor-Led Sessions:** Delivered by experienced tax, legal, and estate planning experts.
- **Interactive Case Studies:** Provide hands-on insights into real-world exit scenarios.
- **Workshops & Group Discussions:** Encourage peer learning and solution sharing.
- **Simulation Exercises:** Build skills in designing exit and succession plans.
- **Practical Toolkits:** Include valuation templates, planning checklists, and frameworks.
- **Feedback & Evaluation:** Reinforce understanding through applied learning assessment.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.com or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to FINESKILL TRAINING CENTER account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
07 Sep 2026	11 Sep 2026	Physical	$1,500

Start Date	End Date	Location	Price
14 Sep 2026	18 Sep 2026	Physical	$1,500
21 Sep 2026	25 Sep 2026	Physical	$1,500
28 Sep 2026	02 Oct 2026	Physical	$1,500
05 Oct 2026	09 Oct 2026	Physical	$1,500
12 Oct 2026	16 Oct 2026	Physical	$1,500
19 Oct 2026	23 Oct 2026	Physical	$1,500
26 Oct 2026	30 Oct 2026	Physical	$1,500

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