

Business & Equity Succession Planning Services Guide



Similar and related to personal [Estate Planning](#), Business Succession Planning is an integral part of all successful business and equity owners.

Murfett Legal has extensive experience in advising on business succession matters and preparing all related legal documentation, including:

- Business and Equity Holding structures;
- Inter-generational aspects and family dynamics as well as management buy-outs;
- Partnership, Shareholder and Unitholder Agreements;
- Insurance-Funded Buy/Sell Agreements;
- Risk Mitigation and Asset Protection Strategies Agreements;
- Co-Owners Agreements;
- Director Deeds of Indemnity;
- Equity Sales and Option Agreements (partial or full);
- Succession Arrangements for Family Trusts and SMSFs;
- Management Buy-Outs and Employee Share Option Schemes;
- Charitable and Philanthropy Arrangements (including Charitable Trusts)

We also work closely with your key other advisors such as your accountants, financial and insurance advisors. This ensures all your Business Succession arrangements are optimised for the best legal, financial, tax and insurance purposes.

Further, owing to our extensive experience combined with our highly-regarded people skills in not only advising on drafting Business Succession documentation but also our understanding of each client's individual needs, we work with our clients to ensure that their personal values and desired business, goals and strategies are fully encompassed.

We also very much recognise [Business Succession Planning](#) is not an overnight or 'one-off' process, rather it's a continuous part of all businesses from the initial formation and start-up right through to multi-generational, continued ownership of a business.

Our Business Equity Succession team is able to work with clients in a pro-active and ongoing advisory role. Based on our extensive skills and experience in this area, you will be confident that all your objectives will be fully understood and properly implemented.

If you would like more information, please contact us on +61 8 9388 3100 or visit our [website](#).

