



PRE-TRANSACTION TAX PLANNING CAN BOOST YOUR BUSINESS'S SALE PRICE (EVEN IF YOU DON'T USE THE TAX PLANNING)

WEDNESDAY, MARCH 11TH, 2026

Registration: 11:30 AM | Program: 12:00 PM – 1:00 PM

Strategic tax planning before a sale can meaningfully increase enterprise value, strengthen negotiating leverage, and create optionality for owners. This program explores pre-transaction planning from three integrated perspectives, corporate structuring, trust and estate strategies, and tax optimization, and explains how early positioning can drive better outcomes even if the ultimate structure changes. Join us for a practical, cross-disciplinary discussion designed for advisors guiding business owners through liquidity events.

ORANGE COUNTY BAR ASSOCIATION
TRUSTS & ESTATES AND BUSINESS &
CORPORATE LAW JOINT SECTION
MARCH MEETING: IN PERSON AT OCBA
OFFICE & LIVE WEBINAR

SPEAKERS:

MATTHEW G. BROWN, ESQ.
PARTNER, *BROWN & STREZA*
LLP

GARY L. FITZPATRICK, ESQ.
PARTNER, *BROWN & STREZA*
LLP

**SHAUN M. MCNAUGHTON,
ESQ.**
PARTNER, *BROWN & STREZA*
LLP

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WWW.OCBAR.ORG**

Meeting Price	Attending In-Person *Lunch Included*	Zoom Only
Trust & Estates and Business & Corporate Law Section Member:	\$0	\$0
OCBA Attorney (Non-Section Member):	\$50	\$25
Non-OCBA Member Attorney:	\$60	\$35

This activity has been approved for MCLE by the State bar of California in the amount of 1.0 hour(s) as appropriate to the content of the activity. OCBA is a state bar approved MCLE provider and certifies that this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the state bar of California governing MCLE. Attendees must attend the program in its entirety in order to receive Participatory MCLE credit. Cancellations must be received in writing via fax or email 3 business days prior to the meeting. OCBA reserves the right to substitute speakers.

OCBA TRUSTS AND ESTATES AND BUSINESS & CORPORATE LAW JOINT SECTION MEETING – MARCH 11TH, 2026

Register online, fax or mail | Mail to: OCBA, P.O. Box 6130 Newport Beach, CA 92658 | Fax to: 949-440-6710

If you are registering by fax or mail within 3 days of the meeting, please contact the OCBA at education@ocbar.org to ensure registration.