NEW YORK SELF STORAGE ASSOCIATION

Charlotte Burnette and her team of financial professionals and tax attorney will provide wealth strategies for Self Storage Owners including:

- **Succession Planning:** If the business founder addresses succession issues thoroughly, thoughtfully and in a timely manner, a business has a much greater chance of surviving into future generations. This discussion will discuss some of the key considerations when turning your business into a family legacy.
- **Opportunistic Wealth Planning Strategies:** Discuss the most efficient ways to achieve your goals and pass down wealth to the next generation.
- **Strategic use of credit:** Discuss strategies on how you structure your personal balance sheet and capital structure so you have access to liquidity. Discuss how you can identify the right credit strategy to provide financial flexibility for varying needs while potentially enhancing portfolio returns.
- **Transaction Planning:** Considerations for self-storage owners leading up to the sale of business and aligning the right wealth strategies.
- **New Administration and New Tax Policy:** a discussion on the critical topics for the impact the new administration will have on tax policy and how this could impact wealth strategies. Additional topics that could be covered include other the key aspects to consider when changing your domicile.

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