

Adam Tarleton Speaks On Succession Planning at US Trust Event

July 25, 2017



Adam Tarleton, a partner in the Greensboro office of Brooks Pierce, recently participated in a panel discussion hosted by U.S. Trust for business owners and professional advisers.

The discussion, titled “Creating a Legacy that Lasts: Thoughts on Succession Planning,” focused on strategies to assist family and privately-held businesses navigate through the process of succession planning. Panel participants discussed the financial and legal challenges involved in succession planning, as well as innovative solutions for assisting clients through the succession process. The panel also consisted of Mark Casella from Coppertree LTD and Robert Gefaell from Plexus Capital, and was moderated by Jonathan Dry, Senior Vice President at U.S. Trust.

The event was held at the Ruth’s Chris Steakhouse in downtown Greensboro on Wednesday, June 21, 2017.