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September 26, 2003

Commercial real estate: The contract is king

If you are buying commercial real estate, a well-crafted contract is worth its weight in gold. Every buyer's contract should have a risk-free period (generally 30 to 60 days) within which to conduct "due diligence."

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Retirement plan assets can be the worst assets in your client's estate, or they can be the best.

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Tax exempt organizations possess certain unique characteristics and are subject to specific Internal Revenue Code provisions which need to be considered when designing and implementing qualified retirement plans and deferred compensation plans for these organizations.

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Should a privately held business ask an institution to serve as the trustee for its retirement plan or should it ask two or three of its key employees to serve in that capacity?

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