Brian J. Kahle

Shareholder

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Transactional Planning Attorney Who Assists Entrepreneurial Clients In All Phases Of Their Business From Formation, Through Growth, And Succession To The Next Generation Or Sale.

Brian assists families and closely-held business owners plan around a variety of legal issues. He helps entrepreneurial families design their legacy through planning for the tax efficient transfer of their businesses, real estate, and liquid wealth. His services often include tax and estate planning and administration. He also represents closely-held businesses from start-up through successful exit. His business advisory services include entity selection and formation, contract review and drafting, governance and compliance issues, tax, succession, and exit planning. Brian firmly believes clients are best served through a collaborative team of advisors, and he enjoys working with client advisors across numerous disciplines, including tax, accounting, valuation, insurance, financial advisory, and investment banking.

Representative Experience

- Assisted multi-family business transition to the next generation through the combined sale and gift of business interests to complex trusts, incorporating estate-freeze techniques as well as support for family philanthropy and charitable causes. Transaction value in excess of $25 MM.
- Counseled the owners of a multi-million dollar business with the planned transfer of their business to children who are involved in the business, with other assets passing to children who are not actively involved in the business.
- Negotiated the strategic sale of a design business to one of its largest customers for $10MM+.
- Designed phantom stock plan for closely-held family business to incentivize and retain talented key employees who were not stockholders.
- Frequently works with business owners and their advisors to develop or amend buy-sell agreements, shareholders' agreements, and operating agreements, coupled with operational management continuity plans.
- Advise numerous clients with asset protection and transfer planning associated with the acquisition and operation of specialty real estate such as vacation properties, second homes, or family farms.
- Merger of control group of affiliated companies to one surviving corporation.
- Negotiated and closed multiple (sell-side) assist sale transactions across various industries and ranging from $500,000 to $15MM+.
- Design, implementation, and maintenance of numerous estate plans for individuals and families, ranging from high-net-worth families to young clients who are just getting started working to elderly clients with very modest means.

- Estate and trust administration for high-net-worth business owner with multiple entities operating in several states and also owning significant real estate holdings.
- Formation, on a *pro bono* basis, of several not-for-profit charitable organizations.

Education

- Duquesne University School of Law (JD, cum laude)
  - Production Editor of the *Duquesne Business Law Journal*
  - Senior Staff Editor of the *Duquesne Law Review*
- Grove City College (BS, cum laude)

Bar Admissions

- Pennsylvania

Court Admissions

- U.S. Court of Appeals for the Third Circuit
- U.S. District Court for the Western District of Pennsylvania
- U.S. Tax Court

Services

- Business & Finance
- Business Succession Planning Capabilities
- Estates & Trusts
- Fiduciary Services & Risk Management
- Mergers & Acquisitions

Industries

- Non-Profit Organizations
- Veterinary Services

Departments

- Business & Finance

Office Locations

- Pittsburgh