

Closely Held & Family-Owned Businesses

Roetzel attorneys serve as trusted advisers to closely held and family-owned business, offering tailored legal counsel that addresses their unique challenges and supports their long-term success. We prioritize building long-term, personalized relationships, allowing us to understand each client's specific goals, values and dynamics. Our team provides comprehensive services, from day-to-day legal advice to strategic planning for growth and succession, while preserving both the business and the family legacy through generational transitions and wealth preservation strategies. Our approach includes crafting customized solutions, managing crises, and planning for the future to keep your business stable and resilient. With our deep commitment to your success, we help you achieve long-term objectives while safeguarding family relationships.



What We Do

- Advise boards of directors and management teams
- Form and structure businesses
- Manage corporate governance, compliance, and ethics
- Draft and negotiate commercial transactions and contracts
- Manage conflict resolution
- Navigate employment law matters
- Develop growth strategies and manage risks
- Protect intellectual property
- Manage litigation
- Facilitate mergers & acquisitions
- Oversee real estate transactions
- Ensure regulatory compliance and provide training
- Guide succession planning
- Plan and manage estates
- Provide tax planning and compliance

Our Experience

- Represent closely held corporations and advise boards of directors with regard to rights of minority shareholders
- Prepared comprehensive and flexible succession plans for owners of closely held businesses
- Assisted with the sale and purchase of closely held business interests
- Through the use of voting and nonvoting stock, we have been able to implement flexible buy-sell agreements, company spinoffs, and/or insurance planning to fund puts and calls and to balance the transfer of income and non-income producing assets; developed organization and succession plans for family businesses in which not all family members are actively involved
- Represented a closely held company which owns, operates, and manages a significant number of nursing homes in a complete reorganization to simplify the ownership structure and governance among the family members