Pluris®

IN-FIRM PRESENTATIONS

Pluris regularly presents on key valuation topics that impact the estate planning professional. Our insights come from experience with sizeable wealth transfers for a variety of asset classes and strategies. Pluris' research and commentary, from key tax court cases to our innovative empirical research, is regularly included in leading publications that cover trust & estate, tax, and finance.

The presentations can be delivered at your firm's location, typically in a 1-1 ½ hour format, or we can arrange to speak at your education-focused estate planning organization. Many of our presentations have been approved for continuing legal education by a number of state bar associations. If you would like to know whether a particular presentation in the list below is approved for CLE credits in your state, please call us.

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We Currently Offer the Following Presentations:

1. Evolution of Valuation Discounts
2. Marketability Discounts: Two Weapons to Win the Battle
3. Discounting Undivided Interests in Real Property
4. Pre-Sale Planning: Applying Merger Arbitrage Data to Pending Transactions
5. Illiquid Securities Valuations: Latest from the Secondary Markets
6. Planning for Fund Managers: Carried Interests and the Vertical Slice
7. Alternative Assets: Discounting of LP Interest Valuations
8. Planning with Stock Options: Discounting from Black Scholes

We enjoy sharing knowledge that can assist you in achieving the best results for your client. Please call us to discuss further, or email us to arrange any of the presentations listed above.