QSBS Masterclass Series with Scott Dolson and QSBSrollover

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Categories:

Podcast
Qualified Small Business Stock (QSBS)

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FBT attorney Scott Dolson teamed up with QSBSrollover.com to present five episodes for the *QSBS, Solved* podcast. Hosted by Brady Weller, co-founder of QSBSrollover.com, each episode homes in on a critical aspect of qualified small business stock (QSBS) planning, from the choice of entity and Section 1202's gain exclusion to reorganizations and rollover transactions under Section 1045.

The QSBS Masterclass Series is designed to be cumulative, starting with QSBS fundamentals before diving into more advanced planning considerations. ***Stream the episodes below. You can also read the companion article for each episode for more detailed analysis on the topics covered therein.***

Part 1: Maximizing QSBS, Section 1202 Planning

Companion article: ***Maximizing Section 1202's Gain Exclusion***

Part 2: Section 1045, QSBS Rollover Planning

Companion article: ***Finding Suitable Replacement QSBS – A Section 1045 Primer***

Part 3: Substantiating and Documenting QSBS

Companion article: ***Substantiating the Right to Claim QSBS Tax Benefits***

Part 4: QSBS After Conversions and Reorganizations

Companion article: ***Conversions, Reorganizations, and Recapitalizations Involving QSBS***

Part 5: Planning for the Sale of QSBS

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Companion article: *Planning for the Sale of Qualified Small Business Stock (QSBS)*

QSBS & Tax Planning Services

Led by FBT attorney Scott Dolson, our QSBS and tax planning services team focuses on maximizing each client's gain exclusion allowable under Section 1202. Our work spans the entire spectrum of QSBS and tax planning issues, from the choice of entity decision through the M&A process and beyond. When clients face a potential IRS audit, we also help gather the documentation necessary to establish they've met the eligibility requirements. Learn more.

About QSBSrollover.com

QSBSrollover.com compiles the best available information about QSBS and QSBS rollovers so that founders and investors can understand the planning opportunities and tax-saving potential associated with Sections 1202 and 1045. Its podcast—*QSBS, Solved*—features audio versions of the most popular articles, expert interviews, and deep dives into QSBS rules and the mechanics of rollovers under Section 1202 and 1045. Learn more.

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