



Principals Direct Group hosts “Post COVID Valuations of Businesses & Real Estate” webinar

November 02, 2020 - Front Section



Islandia, NY Principals Direct Group (PDG) hosted a post-COVID valuations webinar on Monday, October 26th.

Steve Kirschner, COO and broker representative of PDG and IREON founder, was the webinar moderator. PDG is a full-service commercial real estate brokerage consulting firm that works exclusively with principals who own and operate income-producing real estate internationally increasing their clients' profitability. Kirschner specializes in “off-market” properties.

Keynote Speakers were:

Steve Bogner, managing director, and partner of Treasury Partners, one of the nation's Top 5 Advisory firms. Bogner is responsible for their corporate retirement plan advisory services especially to those relating to 401(k) defined contribution, defined benefit, and non-qualified deferred compensation plans.

Barry Sunshine, sr. tax partner at Janover LLC, rated as one of the top accounting firms in the Mid-Atlantic Region. Sunshine specializes in sophisticated income and estate tax planning for closely-held businesses and their owners. he advises on topics that include succession planning for businesses, structuring business purchases and sales cost segregation studies, utilization of qualified and non-qualified pension plans, and federal, state tax credit utilization.

Edward Gordon, founder/president of Preservation Capital Partners, LLC., began his career in 1990 and has decades of experience in the field of business and estate planning. He is experienced in creating customized strategies and plans for wealth enhancement its preservation and succession, including an alternative to a 1031 exchange to avoid or reduce capital gains taxes. These strategies are fully supported by the highest standard of legal and accounting authorities.

Panelists** were:

Neil Axler, managing director of B Riley Advisory Services;
Vikash Jha, president of Synzen Ventures;
Steve Lifton, managing director Cambridge Wilkenson; and,
Jordan Toder, principal of Preservation Capital Partners.

**Panelists are strategic partners of Principals Direct Group.

Topics included were:

“How the different outcomes of the election will affect the economy?”

“What are post-COVID investment themes to consider?”

“What are the best gifting strategies that a wealthy investor should be thinking about now?”

“How important are income tax rates in shaping our US economy?”

“What should business owners think about for year-end tax planning for 2020?”

“If a real estate investor has a contract to sell, would you advise pro or con to close the transaction before or after December 31?”

“Can an IDF Manager manage an IDF for a related policy-holder?” and

“Can a real estate owner do this with a negative basis?”

Expert answers and prudent advice were given by all the speakers including valuable comments by the panelists. For a recording of the webinar, contact Steve Kirschner at SKirschner@IreonNetwork.com

[CLICK HERE](#) to access webinar audio.

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