The New QSBS Landscape: Planning Opportunities for Business Owners and Investors (December 15 at Aronimink Golf Club)

Speaking Engagements & Seminars

12.15.2026

Presented by: Justin D. Csik, Martyn S. Babitz, Bozena M. Diaz

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Recent federal and New Jersey law changes, including the One Big Beautiful Bill Act (OBBBA), have expanded and enhanced the tax benefits available to business owners, founders, and investors holding Qualified Small Business Stock (QSBS). These developments create new opportunities to reduce tax liability, enhance exit planning, and facilitate wealth transfer.

Join Archer & Greiner and NewSpring Capital for a practical discussion of the real-world implications and planning opportunities arising from the recent enhancements to the QSBS landscape.

Key Topics

- OBBBA structural changes and implications for QSBS
- Issuance mechanics and planning considerations
- Holding period strategies
- Exit planning considerations
- M&A considerations from both seller and acquirer perspectives
- Structuring investments and transactions to maximize QSBS benefits
- Employee and service provider equity planning
- Succession planning and liquidity events

- Estate and gifting strategies

Speakers

- Justin Csik - Partner, Archer & Greiner, P.C. (Moderator)
- Martyn Babitz - Of Counsel, Archer & Greiner, P.C.
- Bonnie Diaz - Partner, Archer & Greiner, P.C.
- Daniel Salvato - Principal, NewSpring Capital
- Brian O'Connor - Managing Director – M&A Tax, Andersen
- Jake Sheldon - VP and Director - Wealth Strategies, Bernstein Private Wealth Management

To register: https://bit.ly/4iWdKJF

Date & Time:
Tuesday, December 15
3:30 PM – 6:00 PM

Location:
Aronimink Golf Club
Newtown Square, PA

Related People



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