



**MALTA STOCK EXCHANGE
INSTITUTE**

**TOWARDS
A BRIGHTER
FUTURE**



Tax and Succession Planning for Businesses

Course No 215

Family-run and small businesses go through a life cycle with two distinct phases: the start-up phase when they are still developing their strategy, product or service, clientele, logistics, resource sourcing, and ultimately the business brand. An important aspect of this initial phase is the management of the business's cash flows. As the business grows over time, capital financing may become a requirements that needs special attention, and at the other extreme of its life cycle, the business owners need to understand the succession planning process and prepare for this. This course is designed to look at a business through its life cycle and address specific issues: the various exemptions and concessions available to star-ups and small businesses, financing options and succession planning.

Supported by:



Sample Topics Covered:

Cash accounting or exemption for small businesses

Monthly refund claims to help cash flow

Registration decision – should one trade as a company or a business?

Micro invest and Micro credit

Bank finance and its effect on a company

Tax deductibility of expense and blocked expense, capital allowances

Use of government property and incentives for specific sectors

Transfer of assets

Corporate governance needs

Brand registration and incentives

Groups and division of operations

Estate and succession planning

Division of companies between children and the tax implications thereof

Floatation and financing options

Name

Position

Company

Company Email

Address

ID Card

Mobile

Applicant Email

The data completed above is being compiled to enable the MSE Institute to communicate with you about the course when necessary.

Registration fee: €120 per participant (Full time students and senior citizens are eligible to a 50% discount). Group bookings of 4 or more persons from the same organisation attract a 10% discount.

Terms and Conditions

Applicants who are registered for the course are not entitled to a refund if they are unable to attend, but may assign their booking to a 3rd party subject to confirmation by the MSE Institute.

Malta Stock Exchange Institute Ltd.

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General Information

Time: 9.00 - 12.00hrs
Venue: Malta Stock Exchange
Subject to COVID-19 related restrictions
Online
Level: Introductory

Schedule

Duration: 6 hours
Dates: 18, 19 May

Target Audience

All owners of businesses, advisors, accountants, lawyers, and anyone involved in family-run businesses and small business management

Lecturer

Mr Paul Giglio



After having worked with Deloitte & Touche, Paul established Attard Giglio + Co in 1998 together with Anthony Attard. Paul specialised in statutory audit and taxation with specialist knowledge in various sectors including insurance, financial services, construction, pharmaceutical, manufacturing, gaming and hospitality. He acts as client service partner for some of our larger international clients. Paul is a graduate from the University of Malta in accountancy, a qualified Chartered Certified Accountant (ACCA) and a certified public accountant. He holds a master degree in MS.

Finance. He is a fellow in the Malta Institute of Accountants and is an active member in various sub-committees of the Institute.

Cheques to be made payable to: Malta Stock Exchange Institute Ltd.

Payments by bank transfer

Bank: Bank of Valletta plc
IBAN Code: MT04VALL22013000000040025119059
IBAN BIC: VALLMTMT

Kindly insert your NAME, SURNAME, ID CARD NUMBER and COURSE NUMBER in the transaction narrative.

This application is to be accompanied by payment or proof of payment by bank transfer.