Datastat Research
Building Capacity in Training and Research

DATASTAT TRAINING IN

OFFICIAL COURSE PROSPECTUS

Center for Advanced Research & Professional Development

Nairobi Training Center • Global Virtual Academy • Corporate On-Site

TAXATION AND REVENUE

Exit & Succession Tax Planning Training Course

Comprehensive Course Syllabus, Practical Modules & Upcoming Schedules

PROGRAM SPECIFICATIONS & HIGHLIGHTS

DURATION
5 Days Practical Hands-on

DELIVERY MODES
In-Person Class & Live Virtual

CERTIFICATION
Accredited Certificate of Completion

INTAKES / DATES
Multiple Cohort Schedules Included

PREPARED FOR:

Valued Participant

Email: training@datastatresearch.org | Issued: November 21, 2026

Academic & Professional Training Year: 2026

DATASTAT TRAINING INSTITUTE

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Exit & Succession Tax Planning Training Course

Taxation and Revenue • 5 Days Intensive • Accredited Certification

Course Overview

Exit & Succession Tax Planning Training Course provides participants with a comprehensive understanding of the tax implications and strategic considerations involved in business exits, ownership transfers, and succession planning.

Upcoming Training Schedules

Confirmed cohort intakes and venues. Both physical in-person classroom and live virtual online seats are available.

TRAINING DATES	LOCATION / VENUE	FORMAT / DURATION	INVESTMENT (FEE)
29 Dec 2025 – 2 Jan 2026	Nairobi	Classroom / 5d	**$1,500 USD / KES 110,000**
29 Dec 2025 – 2 Jan 2026	Kigali	Classroom / 5d	**$3,000 USD / KES 90,000**
29 Dec 2025 – 2 Jan 2026	Dubai	Classroom / 5d	**$5,000 USD / KES 90,000**
29 Dec 2025 – 2 Jan 2026	Cape Town	Classroom / 5d	**$4,500 USD / KES 90,000**
29 Dec 2025 – 2 Jan 2026	Addis Ababa	Classroom / 5d	**$3,000 USD / KES 90,000**
29 Dec 2025 – 2 Jan 2026	Singapore	Classroom / 5d	**$5,000 USD / KES 90,000**
29 Dec 2025 – 2 Jan 2026	Istanbul	Classroom / 5d	**$5,000 USD / KES 90,000**
29 Dec 2025 – 2 Jan 2026	Bangkok	Classroom / 5d	**$5,000 USD / KES 90,000**
29 Dec 2025 – 2 Jan 2026	Accra	Classroom / 5d	**$4,000 USD / KES 90,000**
5 Jan 2026 – 9 Jan 2026	Nairobi	Classroom / 5d	**$1,500 USD / KES 110,000**
5 Jan 2026 – 9 Jan 2026	Kigali	Classroom / 5d	**$3,000 USD / KES 90,000**
5 Jan 2026 – 9 Jan 2026	Dubai	Classroom / 5d	**$5,000 USD / KES 90,000**

* Corporate discounts and customized cohort scheduling are available for teams of 3 or more participants.

Course Curriculum & Modules

Exit & Succession Tax Planning Training Course

Introduction

Exit & Succession Tax Planning Training Course provides participants with a comprehensive understanding of the tax implications and strategic considerations involved in business exits, ownership transfers, and succession planning. It focuses on developing tax-efficient structures that minimize liabilities during the sale, transfer, or inheritance of business assets, while maintaining full compliance with both domestic and international tax regulations. Participants will explore practical approaches to structuring buyouts, mergers, acquisitions, and estate transfers that safeguard wealth and ensure business continuity across generations.

The course also examines critical issues in family business succession, including governance, valuation, estate taxation, and capital gains management. Emphasis is placed on aligning exit strategies with broader financial, legal, and personal objectives to achieve seamless transitions. Through real-world examples and case studies, professionals will learn to design and implement integrated exit and succession plans that balance tax efficiency, wealth preservation, and long-term business sustainability in an evolving global tax environment.

Course Objectives:

By the end of this course, participants will be able to:

- Understand the tax implications of business exits, mergers, and ownership transfers.
- Design tax-efficient exit and succession strategies tailored to business structures.
- Apply capital gains, inheritance, and gift tax principles to ownership transitions.
- Evaluate the use of trusts, holding companies, and estate planning vehicles.

- Manage valuation, buyout, and equity restructuring for tax optimization.
- Navigate cross-border exit planning and international tax implications.
- Ensure compliance with anti-avoidance, disclosure, and reporting requirements.
- Develop family governance frameworks for intergenerational wealth transfer.
- Integrate philanthropic giving into exit and succession planning.
- Assess the role of private equity, venture capital, and investors in exits.
- Formulate tax strategies for entrepreneurs and retiring shareholders.
- Mitigate risks associated with exit timing and market volatility.
- Align exit planning with legacy, continuity, and long-term wealth goals.

Target Audience:

- Business Owners and Founders
- Tax Consultants and Advisors
- Financial Planners and Accountants
- Estate and Wealth Managers
- Family Office Executives
- Corporate Lawyers and Legal Advisors
- M&A and Private Equity Professionals
- Succession and Governance Consultants

Course Duration: 5 days

Course Modules:

Module 1: Fundamentals of Exit & Succession Planning

- Definition, objectives, and key drivers of exit and succession planning
- Importance of early tax planning in exit strategies
- Identifying succession options and transition models
- Common challenges in ownership and leadership transitions
- Tax and regulatory frameworks influencing exit decisions
- Case Study: Tax consequences of a business owner’s exit strategy

Module 2: Taxation of Business Transfers and Exits

- Capital gains tax implications on sale or transfer
- Asset vs. share sale considerations
- Rollovers, deferrals, and exemptions
- Managing goodwill and intangible asset taxation
- Exit tax regimes and international implications
- Case Study: Structuring a tax-efficient sale of a family enterprise

Module 3: Estate, Gift, and Inheritance Tax Planning

- Estate and inheritance tax rules and thresholds
- Lifetime gifting and family trust planning
- Wealth transfer and generation-skipping strategies
- Coordinating wills, trusts, and corporate ownership
- Valuation and liquidity management for estates
- Case Study: Succession planning for multi-generational families

Module 4: Family Business & Intergenerational Succession

- Family governance and continuity planning
- Leadership succession and ownership transitions
- Family constitutions and shareholder agreements
- Managing family disputes and succession challenges
- Tax-efficient equity redistribution among heirs

- Case Study: Intergenerational ownership transfer in family firms

Module 5: International and Cross-Border Exit Planning

- Tax residency and exit taxation considerations
- Cross-border asset transfers and treaty implications
- Managing double taxation and withholding taxes
- Offshore trusts and estate planning vehicles
- Expatriation tax and mobility considerations
- Case Study: International exit planning for global entrepreneurs

Module 6: Private Equity, M&A, and Investor Exits

- Structuring investor exits and buyouts
- Taxation of capital distributions and carried interest
- Shareholder agreements and earn-out structures
- Venture capital and IPO exit tax planning
- Managing risks in strategic acquisitions and divestments
- Case Study: PE-backed exit strategy and post-sale structuring

Module 7: Philanthropy and Legacy Planning

- Integrating charitable giving into succession strategy
- Donor-advised funds and private foundations
- Tax incentives for philanthropic contributions
- Social impact and legacy planning frameworks
- Balancing financial goals with societal contributions
- Case Study: Designing a philanthropic exit strategy

Module 8: Risk Management & Compliance in Exit Planning

- Tax audits, disclosures, and reporting obligations
- Anti-avoidance legislation and GAAR applications
- Managing confidentiality and valuation risks
- Legal documentation and due diligence processes
- Developing compliant and ethical exit strategies
- Case Study: Regulatory risk assessment in exit planning

Training Methodology:

- Instructor-Led Sessions: Delivered by experienced tax, legal, and estate planning experts.
- Interactive Case Studies: Provide hands-on insights into real-world exit scenarios.
- Workshops & Group Discussions: Encourage peer learning and solution sharing.
- Simulation Exercises: Build skills in designing exit and succession plans.
- Practical Toolkits: Include valuation templates, planning checklists, and frameworks.
- Feedback & Evaluation: Reinforce understanding through applied learning assessment.

Register as a group from 3 participants for a Discount

Send us an email: info@datastatresearch.org or call +254724527104

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to DATASTAT CONSULTANCY LTD account, as indicated in the invoice so as to enable us prepare better for you.

Certification & Learning Methodology

- Hands-on practical delivery with real-world datasets, case studies, and lab exercises.
- Post-training mentorship, access to class resources, and customized follow-up support.
- Participants who successfully complete the course receive an accredited Datastat Certificate of Completion.

How to Enroll & Reserve Your Seat

1. Online Registration: Visit https://datastatresearch.org/courses/exit-succession-tax-planning-training-course to register online.
2. Email Booking: Send participant details to training@datastatresearch.org for official invoice & reservation.
3. Support & Assistance: Inquire via phone +254 724 527 104 | +254 734 969 612.