



## Jeffrey B. Scheer

### Member

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## Profile

**Jeffrey concentrates his practice on business succession planning for closely held and family owned businesses, which includes all areas of general corporate law and trusts and estates law matters.**

He represents multi-generations of families, and family or closely-held businesses, with a focus on business, estate, tax, transactional and succession planning, inter-generational wealth transfers, philanthropic plans and trust administration.

His practice includes sophisticated estate and financial planning for wealth preservation and asset protection, charitable planned giving and tax compliance. He counsels clients on the use of charitable trusts and charitable foundations, qualified personal residence trusts, limited liability companies and family limited partnerships in conjunction with their estate and business succession plans.

Jeffrey has represented several family owned businesses in the development of business succession plans, which includes the transfer of equity between generations and the sale of equity to unrelated third parties. He has also represented families in the formation of private foundations, both to accomplish a family's estate and asset protection goals and to establish a vehicle for a family's collective charitable giving.

## Honors & Affiliations

- Listed in:
  - *The Best Lawyers in America*®, Business Organizations (including LLCs and Partnerships); Corporate Law, 2023-2024
  - *New York Super Lawyers*®, Business and Corporate, 2023
- New York State Bar Association
- Massachusetts Bar Association
- Onondaga County Bar Association

## Representative Presentations

- "Summer Fun" Series - An Interview with Jeffrey Scheer, Legally Bond Podcast, August 1, 2022

## Education

- University at Buffalo School of Law (J.D. 1996)
- University of Rochester (B.A., *with honors*, 1993)

## Bar/Court Admissions

- New York
- Massachusetts

## Practices

- Startup and Emerging Business
- Long Term Care
- Exempt Organizations
- Trust and Estate
- Mergers and Acquisitions
- Health Care
- Business and Transactions
- Manufacturing
- Essential Resources for Business
- The Cannabis Industry

- An Interview with Jeffrey Scheer, Business Law and Cannabis, Legally Bond Podcast, May 17, 2021
- Managing in Year 2 of a Pandemic - Round 2 of PPP Loans, Chemung County Chamber of Commerce, February 16, 2021
- Panel Member, SBA's Paycheck Protection Program and Farmer Co-ops, National Council of Farmer Cooperatives, April 6, 2020
- Panel Member, Successful Strategies for Ownership Transition, Dannible & McKee's Central NY Manufacturing Conference, October 17, 2017
- Legal Update, Syracuse Builders Exchange - Construction Company Growth Accelerator Program, October 11, 2017
- Moderator, UVANY Middle Market Forum, March 15, 2016
- The Echoes of the New York State Revitalization Act - Is Your Organization Compliant?, Dannible & McKee's Annual Nonprofit Conference, January 13, 2015

## Representative Publications

- Co-Author, "New York's 2023 Budget Will Provide State Tax Relief to Cannabis Businesses," Referenced in *Bloomberg Tax*, August 22, 2022
- Co-Author, "New York Approves the First Regulations for Adult-Use Cannabis," Referenced in Green Market Report, July 13, 2022
- Co-Author, "N.Y. Cracks Down on "Gifting," Other Unlicensed Sales of Cannabis," *CNYBJ*, July 25, 2022
- Quoted in "Where's the Exit? Planning Business Succession," *Oswego County Business Magazine*, September 27, 2021
- "Practical Advice for Prospective THC License-Holders," New York Cannabis Growers and Processors Association Newsletter, June 2021
- Quoted in "PPP Round 2: What Small Business Owners Need to Do Right Now to Get Help," *syracuse.com*, January 9, 2021
- Quoted in "Local Businesses Eagerly Await Second Round of PPP Assistance," *10 Tampa Bay*, December 28, 2020
- Quoted in "Quickie lender Kabbage doled out billions in PPP loans. A number of borrowers raised red flags," *Miami Herald*, September 10, 2020
- Quoted in "Copycat websites, newly minted companies, double dippers cashed in on PPP loans," *Miami Herald*, September 9, 2020
- Quoted in "Senate Considers Vote on PPP Bill: CNY Small Business Owners Say Changes Needed Now," *syracuse.com*, June 3, 2020
- Quoted in "You Got a PPP Loan. Now What? 4 Expert Tips From a Small Businesses Lawyer," *syracuse.com*, May 6, 2020
- Quoted in "Guide to Federal Small Business Loans: 9 Expert Tips on Coronavirus Relief Funds," *syracuse.com*, April 13, 2020

## Other Activities

- *Business Journal News Network*, Board Leadership Award Honoree 2016
- Board Member, Green Family Foundation
- Board Member, The Jewish Community Foundation of Central New York, Inc.

- Board Member, The Jewish Health & Rehabilitation Center
- Board Member, The Jewish Home of Central New York Foundation
- Former Member and Chair, Board of Trustees, Public Broadcasting Council of Central New York, Inc. (WCNY)