Investors speak July 2023

UBS Investor Watch

Wind in your sales

Setting course for a successful business sale

After a robust cycle for middle-market business sales, the headlines about the state of the M&A market look to be weighing on business owners. Many regret not selling sooner and worry about falling valuations, according to the latest UBS *Investor Watch* report. Have business owners missed the proverbial boat?

In this national webinar, experts from UBS will discuss the report's findings and offer their thoughts on the latest market trends affecting business owners' sales and exit opportunities, addressing what owners can be doing now to prepare themselves and their business for one of life's most significant financial events.

Please join us **Wednesday, August 2nd from 1:00 to 1:45 p.m. ET** featuring:

- **James Jack**, Managing Director, Head of Business Owners and Multigenerational Wealth Client Segments, UBS Global Wealth Management
- **Brian Fischbein**, Managing Director, Private Financing Markets & OneBank Coverage, UBS Investment Bank
- **Carrie Larson**, Executive Director, Senior Wealth Strategist, Advanced Planning, UBS Global Wealth Management

The panel will discuss the report, the current M&A market trends for middle-market business owners and key planning strategies to support the people and causes that matter most. The discussion will include some of the latest key sector insights (such as on technology, health care and others) and sales to employees via an Employee Stock Ownership Plan (ESOP).

Email questions in advance to sh-wmabusinessowners@ubs.com
Read speaker bios
Date and time: Wednesday, August 2 at 1:00 – 1:45 p.m.ET (10:00 – 10:45 a.m. PT)
Replay: Available shortly after the event concludes

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