UBS

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Founder's Club: Exit Planning Experience

You’ve built a booming business. Now what? Set course for a successful business sale.

Come ready to connect with other influential business owners and learn to exit with confidence. Partake in a discussion about how to navigate the challenges of the current M&A market and maximize the outcome of your liquidity event.

Enjoy great drinks, dinner paired with a wine tasting and even better company!

Thursday, October 12
6:00-9:00pm

RSVP to be nominated to attend. Invite Only.

RSVP by
Thursday, September 21

Amanda R. Gordon, AWMA®
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Speakers

Brian Fischbein
Managing Director
Private Financing Markets & OneBank
UBS Investment Bank

Catherine McDermott
Senior Wealth Strategist
UBS Advanced Planning Group

Kent R. McGlincy, MBA
Client Portfolio Manager
Invesco

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Ed Ventrice, CIMA®, CFP®, CEPA®
Managing Director
Private Wealth Advisor

Michael MacDonald, CFP®
Senior Vice President – Wealth Management
Senior Portfolio Manager

William Marino, CFP®, AWMA®
Senior Vice President – Wealth Management

Sarah Ponczek, CFP®, CIMA®
Vice President – Wealth Management

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