



You. Connected. | Private Wealth Management

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

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Speakers

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Catherine McDermott

Senior Wealth Strategist
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Kent R. McGlincy, MBA

Client Portfolio Manager
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UBS Private Wealth Management

Ed Ventrice, CIMA®, CFP®, CEPA®

Managing Director
Private Wealth Advisor

Michael MacDonald, CFP®

Senior Vice President – Wealth
Management
Senior Portfolio Manager

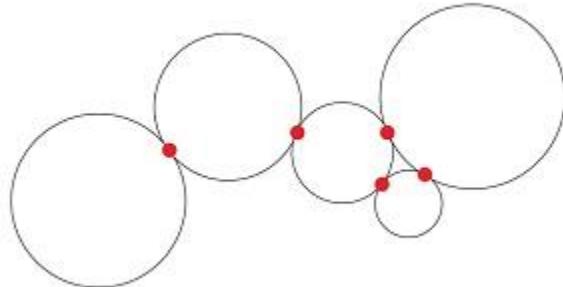
William Marino, CFP®, AWMA®

Senior Vice President – Wealth
Management

Sarah Ponczek, CFP®, CIMA®

Vice President – Wealth Management

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