



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

Amanda R. Gordon, AWMA®

Wealth Strategy Associate

561-367-1841

amanda.gordon@ubs.com

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

BV Group

UBS Financial Services Inc.

1800 North Military Trail
Suite 300
Boca Raton, FL 33431
561-367-1800

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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

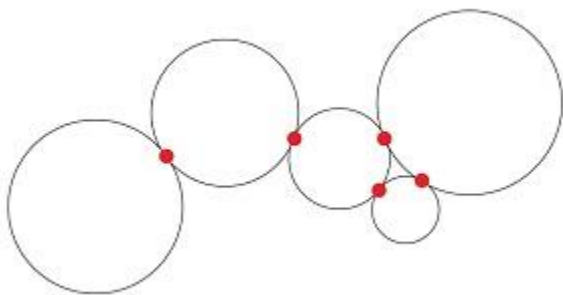
William Marino, CFP®, AWMA®

Senior Vice President – Wealth
Management

Sarah Ponczek, CFP®, CIMA®

Vice President – Wealth Management

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