



You. Connected. | UBS Private Wealth Management

# Looking to Exit?

## How to Get the Valuation You Want



Join us to learn how to maximize your business valuation when planning an exit. We will cover key strategies, including the pros and cons of debt versus equity financing, the optimal time for giving up equity, when to take on debt, and techniques for rightsizing your balance sheet.

### Speaker

**Zach Darrow**

Chairman  
DarrowEverett LLP

**Wednesday, July 24**

2:00-2:45pm (ET)

**[Click here to RSVP](#)**

**RSVP by**

**Tuesday, July 23**

Amanda R. Gordon  
Wealth Strategy Associate  
[amanda.gordon@ubs.com](mailto:amanda.gordon@ubs.com)

**UBS Financial Services Inc.**  
1800 North Military Trail  
Suite 300  
Boca Raton, FL 33431  
**561-367-1841**

**Hosted by**

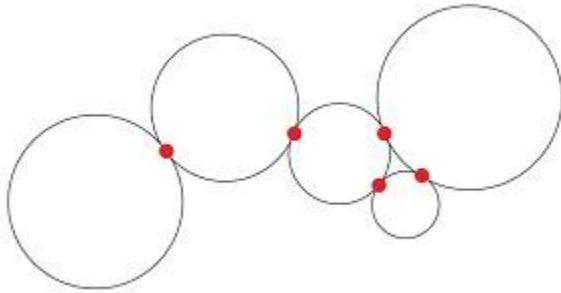


**Sarah Ponczek,**  
**CIMA®, CFP®**  
First Vice President -  
Wealth Management

**BV Group**

UBS Private Wealth Management

[advisors.ubs.com/bvgroup](https://advisors.ubs.com/bvgroup)



**You. Connected.**

We access the exceptional resources of UBS Private Wealth Management on your behalf. By connecting you to the firm's centers of excellence, we bring you some of the most innovative thinking and solutions available.

In order to continue to offer events for our clients, we will be using Zoom to reach you virtually. Client privacy is of utmost importance; when entering the Zoom meeting, use a name you are comfortable being displayed for all attendees to see, such as just your first name or your initials. If you are concerned about confidentiality, please do not use your full name as it will be visible to other participants.

Wealth Management and Private Wealth Management and UBS International are divisions of UBS Financial Services Inc., a subsidiary of UBS AG. Private Wealth Management resources and services are provided by specially-accredited Financial Advisors within UBS Financial Services Inc. (including Private Wealth Advisors and International Private Wealth Advisors).

Please note that the views presented by third party speakers are their own views and may not necessarily be the same as those of UBS Group AG and its affiliates. UBS does not attest to the accuracy and completeness of any information or associated materials provided by them. UBS makes no recommendation in relation to them or their services. DarrowEverett LLP and UBS Financial Services Inc. are not affiliated.

As a firm providing wealth management services to clients, UBS Financial Services Inc. offers investment advisory services in its capacity as an SEC-registered investment adviser and brokerage services in its capacity as an SEC-registered broker-dealer. Investment advisory services and brokerage services are separate and distinct, differ in material ways and are governed by different laws and separate arrangements. It is important that you understand the ways in which we conduct business, and that you carefully read the agreements and disclosures that we provide to you about the products or services we offer. For more information, please review the client relationship summary provided at [ubs.com/relationshipsummary](https://ubs.com/relationshipsummary), or ask your UBS Financial Advisor for a copy.

For designation disclosures visit [ubs.com/us/en/designation-disclosures.html](https://ubs.com/us/en/designation-disclosures.html). © UBS 2024. The key symbol and UBS are among the registered and unregistered trademarks of UBS. All rights reserved. UBS Financial Services Inc. is a subsidiary of UBS Group AG. Member FINRA/SIPC. UBS Financial Advisors are Registered Representatives of UBS Financial Services Inc.

If you no longer wish to receive this type of content, please reply with your request.