

# Monetize your life's work

Join us for dinner and a discussion on exit planning options



You're invited to a one-on-one dinner with Mark Korona and David Demarest of Paradigm Partners, who have helped their business owner clients realize approximately \$210 million in proceeds from business sales. This dinner will allow you to learn the exit planning strategies that are best suited to your unique situation.

We will cover essential topics including:

- Analysis of current business
- Selection of investment bank partners
- National access to buyers
- Deal structures to maximize results
- Forecasting post-transaction cash flow needs
- Estate/trust/tax planning strategies

Don't miss this opportunity to explore your options.

**Hosted by**

**Mark Korona**

Senior Vice President—  
Wealth Management

**David Demarest**

Senior Vice President—  
Wealth Management

**March 18, 19 and 25**

6:00 – 8:00 p.m.

**Jeff Ruby's Steakhouse**

101 West Vine Street  
Lexington, KY 40507

*Please call or e-mail to select the date that works best for you.*

**RSVP**

Spencer Tabor  
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spencer.tabor@ubs.com

**Paradigm Partners**

**UBS Financial Services Inc.**

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Lexington, KY 40502  
859-335-8108

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Do not attend this event if you have any of the following: symptoms of COVID-19 (which may include cough, shortness of breath, chills, muscle pain, headache, sore throat, loss of taste or smell, nausea or vomiting, diarrhea, congestion or runny nose not related to allergies); fever of 100.4 degrees Fahrenheit (F) or higher; pending viral test for COVID infection due to symptoms; diagnosis of COVID infection in the prior 10 days; close contact to someone with COVID during the prior 14 days. 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](http://ubs.com/relationshipsummary), or ask your UBS Financial Advisor for a copy. © UBS 2024. All rights reserved. The key symbol and UBS are among the registered and unregistered trademarks of UBS. UBS Financial Services Inc. is a subsidiary of UBS Group AG. Member FINRA/SIPC. ED\_01182024-1 Exp.: 01/31/2025