



# 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
- Post-transaction cash flow needs
- Estate/trust/tax planning strategies

Don't miss this opportunity to explore your options.

## Hosted by

### Mark Korona

Financial Advisor  
Senior Vice President–  
Wealth Management

### David Demarest

Financial Advisor  
Senior Vice President–  
Wealth Management

**Monday, November 3**

**Tuesday, November 4**

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  
859-317-6464  
spencer.tabor@ubs.com

## Paradigm Partners

### UBS Financial Services Inc.

307 South Ashland Avenue  
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