



Monetize your life's work

Join us for a discussion on exit planning options



Join us for an exclusive event with Mark Korona, David Demarest, and Sarah Clark of Paradigm Partners, who have helped business owner clients realize approximately \$210 million in proceeds from business sales. This is a one-on-one event (only you) to learn the exit planning strategies that are best suited for your unique situation.

This interactive session will cover essential topics including:

- Business analysis and readiness
- Selection of investment bank partners
- National access to buyers
- Deal structures to maximize results
- Post-transaction cash flow needs
- Estate, trust, and 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

Sarah A. Clark

Financial Advisor

Monday, November 10

Tuesday, November 11

3:00 – 4:00 p.m.

Virtual via Microsoft Teams.

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

RSVP

Please contact Spencer Tabor at 859-317-6464 or spencer.tabor@ubs.com, indicating your preferred date and time, to receive your virtual event access link.

Paradigm Partners

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