

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 our financial advisors, designed exclusively for business owners who want to better understand their options for the future. Our advisory team has helped business owner clients realize approximately \$210 million in proceeds from business sales, and this personal dinner provides an opportunity to discuss exit planning strategies tailored to your unique situation.

Discussion topics may include areas most relevant to your situation, such as:

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

Hosted by

Mark Korona
Financial Advisor
Senior Vice President—
Wealth Management

David Demarest
Financial Advisor
Senior Vice President—
Wealth Management

Sarah Clark
Financial Advisor

Monday, May 4th

Tuesday, May 5th

6:00 – 8:00 p.m.

Tony's of Cincinnati

12110 Montgomery Road
Cincinnati, OH 45249

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

RSVP

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