Monetize your life's work

Join us for a discussion on exit planning options

Join us for a one-on-one video conference 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. This individualized session (*only you*) is designed to help you explore exit planning strategies best suited for your unique business.

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

– Analysis of current business
– Selection of investment banking 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
Managing Director–
Wealth Management

David Demarest
Financial Advisor
Senior Vice President–
Wealth Management

Sarah A. Clark
Financial Advisor

Wednesday, May 20
Thursday, May 21
1:00 p.m. ET or 4:00 p.m. ET

Video Conference via Microsoft Teams.

RSVP
Please call or e-mail with your preferred date and time to receive your event link.

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