Let’s talk over dinner

A discussion focused on your business, your goals, and your options.

We would like to invite you to a private dinner with our advisory team. Over the years, our team has helped business owners realize approximately $210 million in proceeds from business sales. This is a one-on-one conversation, not a group event or seminar, designed to give you an opportunity to discuss your business, future plans, and exit planning considerations.

Discussion topics may include:
- 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
Managing Director–
Wealth Management

David Demarest
Financial Advisor
Senior Vice President–
Wealth Management

Sarah Clark
Financial Advisor

Monday, October 12
Tuesday, October 13
6:00 – 8:00 p.m. ET

Steak & Bourbon
1321 Herr Lane
Louisville, KY 40222

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

RSVP

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