



Founder Pre-Liquidity Planning Lunch

A lively lunch panel with the founders of Promissory and Olarry providing practical guidance on Qualified Small Business Stock (QSBS) planning and tax-efficient wealth preservation strategies.

Hosted By: **Presidio Partners**

Speakers:

Warren Coughlin – Senior Vice President, Private Wealth Advisor, UBS

Brian Lamb – Founder, Promissory

Corey Heldreth – Founder of Olarry Tax

When: **Thursday October 1st, 12:00pm-2pm PT**

Where: **Zaytinya Palo Alto – 180 El Camino Real Suite EE1400, Palo Alto, CA 94304**



Presidio Partners
UBS Financial Services Inc.
2000 Avenue of the Stars, 12th Floor South
Los Angeles, CA 90067
[Team Website](#)
310-734-2395

Please note that the views presented by third party speakers are their own views and may not necessarily be the same as those of UBS Group AG and its affiliates. UBS does not attest to the accuracy and completeness of any information or associated materials provided by them. UBS makes no recommendation in relation to them or their services. This event is for informational and educational purposes only and should not be relied upon as investment advice or the basis for making any investment decisions. The views and opinions expressed may not be officially those of UBS Financial Services Inc. and the firm does not verify nor guarantee the accuracy or completeness of the information presented. Neither UBS Financial Services Inc. nor its employees (including its Financial Advisors) provide tax or legal advice. You should consult with your legal counsel and/or your accountant or tax professional regarding the legal or tax implications of a particular suggestion, strategy or investment, including any estate planning strategies, before you invest or implement.

Important information about brokerage and advisory services. As a firm providing wealth management services to clients, UBS Financial Services Inc. offers investment advisory services in its capacity as an SEC-registered investment adviser and brokerage services in its capacity as an SEC-registered broker-dealer. Investment advisory services and brokerage services are separate and distinct, differ in material ways and are governed by different laws and separate arrangements. It is important that you understand the ways in which we conduct business, and that you carefully read the agreements and disclosures that we provide to you about the products or services we offer. For more information, please review the client relationship summary provided at ubs.com/relationshipsummary, or ask your UBS Financial Advisor for a copy.

UBS Financial Services Inc. is not affiliated with Olarry or Promissory.

Private Wealth Management is a segment within UBS Financial Services Inc., which is a subsidiary of UBS Group AG. © UBS 2026. All rights reserved. The key symbol and UBS are among the registered and unregistered trademarks of UBS. UBS Financial Services Inc. is a subsidiary of UBS Group AG. Member FINRA/SIPC.