

# Preparing for a Strategic Exit

For business owners planning the next chapter



Over the next five years, millions of closely held business will be sold in the United States. You have worked years, if not a lifetime, to build your business and it's important to feel confident and best prepared for the future.

Please join us for an exclusive business owner forum where we will explore:

- **Positioning your company for maximum value** with the latest insights on today's M&A environment
- **Maximizing net proceeds** and preparing for what's next
- **Connecting with fellow business owners** to share ideas and opportunities

## Our speakers:

### Mark Pupillo

Vice President  
DC Market Leader California  
Blackrock, Inc.

### Mark Simser

Regional Director  
Nonqualified Plans  
Principal Financial, Inc.

### Brian Howard

Senior Director  
Retirement Solutions  
Principal Financial, Inc.

### Jason Israel

Director  
Retirement Benefits Consultant  
UBS Financial Services Inc.

### Peter Yan

Executive Director  
Unified Global Banking  
UBS Securities LLC

### Danielle Martinez

Authorized Officer  
Wealth Planning Strategist  
UBS Financial Services Inc.

### James Jack

Managing Director  
Head, Business Owner Client Segment  
UBS Financial Services Inc.

**Tuesday, February 24th**  
**8:30 a.m. – 12:00 p.m. PT**

## SD Tech by Alexandria

9645 Scranton Rd  
San Diego, CA 92121  
Santana Room

*Continental breakfast and lunch will be provided by Blackrock, Inc. and Principal Financial, Inc.*

Space is limited. Please **RSVP to your Financial Advisor** by February 18<sup>th</sup>

## Hosted by:

### Justin Frame

Managing Director  
Market Executive  
UBS Financial Services Inc.

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